

GUIDE FOR FULBRIGHT VISITING SCHOLARS

Privileges and Obligations Under the Fulbright Scholar Program



March 2005

Please bring this *Guide* with you to the United States for reference during your grant period. There are required forms in the appendices. This *Guide* can also be found online at <http://www.cies.org/vsgrantees>. The Fulbright Visiting Grantee Web page is a password protected Web page for grantees only. The user name and password are both “vsgrantees.”

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Welcome

International education exchange is the most significant current project designed to continue the process of humanizing mankind to the point, we would hope, that men can learn to live in peace — eventually even to cooperate in constructive activities rather than compete in a mindless contest of mutual destruction.

—Senator J. William Fulbright

Congratulations on becoming a Fulbright Scholar! You join a community of nearly 44,700 academics and professionals from around the world who have come to the United States for research or lecturing as Fulbright Senior Scholars. The U. S. Department of State Bureau of Educational and Cultural Affairs (ECA) and the Council for International Exchange of Scholars (CIES) welcome you. Together, the Department of State, as a government organization, and CIES, as a private cooperating organization, administer the Fulbright Program for visiting faculty and professionals. Along with the honor of being a Fulbright Scholar, there are also obligations. This *Guide for Fulbright Visiting Scholars* will acquaint you with these obligations and will help you prepare for the program and serve as a reference during your grant. We expect that as a Fulbright Scholar, you have read and understood these guidelines. If the *Guide* does not answer your questions or you need further explanation prior to departure, contact the Fulbright organization in your home country.

During your stay in the United States, CIES staff will be available to assist you whenever possible. You can find a list of CIES staff members on the inside cover of this *Guide*. For information and advice about academic and campus matters, consult your faculty associate or the office of international programs at your host institution.

We wish you every success in your scholarly and professional endeavors and trust that your experience will be valuable and satisfying.

As part of your preparation to leave for the United States, familiarize yourself with the material in this Guide. It will be very helpful to you during your stay in the United States, so it is very important that you bring it with you.

SENATOR J. WILLIAM FULBRIGHT

J. William Fulbright was born on April 9, 1905, in Sumner, Missouri. He was educated at the University of Arkansas where he was awarded a B.A. degree in political science in 1925. He then attended Oxford University as a Rhodes Scholar where he received an M.A. degree.

When Fulbright returned to the United States, he studied law at George Washington University in Washington, D.C. During the 1930's, he served in the Justice Department and was an instructor at the George Washington University Law School. In 1936 he returned to Arkansas where he was a lecturer in law and, from 1939 to 1941, served as the youngest university president in the country at the University of Arkansas.

He entered politics in 1942 and was elected to the U.S. House of Representatives, entering Congress in January 1943 and becoming a member of the Foreign Affairs Committee. In September of that year the House of Representatives adopted the Fulbright Resolution supporting an international peace-keeping machinery encouraging United States participation in what became the United Nations. This brought national attention to Fulbright.

In November 1944, he was elected to the U.S. Senate and served there from 1945 through 1974, becoming one of the most influential and best-known members of the Senate. His legislation establishing the Fulbright Program passed through the Senate without debate in 1946. Its first participants went overseas in 1948, funded by war reparations and foreign loan repayments to the United States. This program has had an extraordinary impact around the world. There have been more than 265,000 Fulbright grantees, all of whom have made significant contributions within their countries as well as to the overall goal of advancing mutual understanding.

In 1949 Fulbright became a member of the Senate Foreign Relations Committee. From 1959-1974 he

served as chairman, the longest serving chairman of that committee in history. His Senate career was marked by some notable cases of dissent. In 1954 he was the only

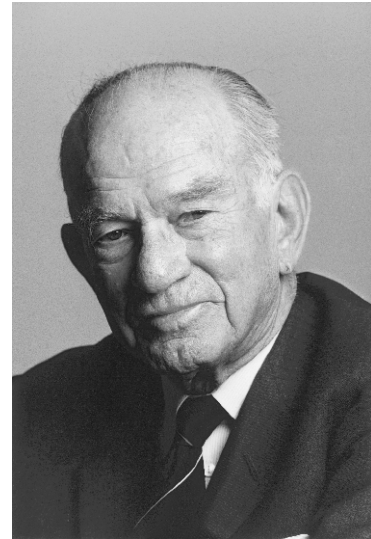
senator to vote against an appropriation for the Permanent Subcommittee on Investigations, which was chaired by Senator Joseph R. McCarthy. He also lodged serious objections to President Kennedy in advance of the Bay of Pigs invasion in 1961.

He was again in the spotlight as a powerful voice in the chaotic times of the war in Vietnam, when he chaired the Senate hearings on United States policy and the conduct of the war. In 1963 Walter Lippman wrote of Fulbright: "The role he plays in Washington is an indispensable role. There is no one else who is so powerful and also so wise, and if there were any question of removing him from public life, it would be a national calamity."

After leaving the Senate, he was of counsel to the Washington law firm of Hogan & Hartson and remained active in support of the international exchange program that bears his name.

He received numerous awards from governments, universities, and educational organizations around the world for his efforts on behalf of education and international understanding. In 1993 he was presented the Presidential Medal of Freedom by President Clinton.

Senator J. William Fulbright died at the age of 89 on February 9, 1995, at his home in Washington, D.C.



Part I: The Fulbright Program and Grant Provisions

1. The Fulbright Program

Shortly after World War II, Senator J. William Fulbright of Arkansas sponsored the legislation that gave rise to the Fulbright Program. President Harry S. Truman signed it into law on August 1, 1946.

Although subsequent laws have refined and expanded the program, (primarily the Mutual Educational and Cultural Exchange Act of 1961, also called the Fulbright-Hays Act), its basic objective has endured: to promote mutual understanding between the people of the United States and those of other countries.

Senator Fulbright believed that through educational exchange, people would better understand citizens and cultures of other nations. “The Fulbright Program aims to bring a little more knowledge, a little more reason, and a little more compassion into world affairs and thereby to increase the chance that nations will learn at last to live in peace and friendship,” he said. This objective remains crucial more than half a century after the program’s inception.

In the 58-year history of the program, more than a quarter of a million people representing more than 150 countries have benefited from a Fulbright experience. Annual appropriations from the U.S.

Congress to the Department of State, contributions from other governments and private sector support in both the United States and abroad provide financial support for the program.

The Fulbright Program offers U.S. citizens and nationals of other countries grants for university lecturing, advanced research, graduate study, and teaching in elementary and secondary schools. The senior scholar component of the Fulbright Program provides opportunities for intellectual and cultural pursuits in an environment of academic freedom and binational cooperation. Fulbright Scholars are chosen for their demonstrated leadership potential.

The success of your Fulbright grant depends on your initiative and input as well as taking advantage of the resources and program enrichment activities available to you. Beyond your academic and professional pursuits, we encourage you to live the goals of the Fulbright Program by learning about the United States—its society, customs, history, and culture—and sharing knowledge about your own country with Americans. Your dedication to cultural exchange will mean the continuing realization of the Fulbright Program’s mutual understanding objectives.

2. Who's Who in the Fulbright Program

The Fulbright Program is administered by the U.S. Department of State with the assistance of binational commissions and foundations in 51 countries, Public Affairs sections of U.S. Embassies in 89 other countries and several cooperating organizations in the United States. The chart below outlines the role of each of these actors in the administration of the program.

J. William Fulbright Foreign Scholarship Board (FSB):	A twelve-member board of educational and public leaders appointed by the President of the United States that determines general policy and direction for the Fulbright Program and <u>approves all candidates nominated for Fulbright awards.</u>
The U.S. Department of State, Bureau of Educational and Cultural Affairs (ECA):	The U.S. government organization responsible for managing, coordinating and overseeing the Fulbright Program. The Bureau has primary responsibility for the administration of the program, including preparation of annual budget requests to the U.S. Congress and decisions on how to allocate the funds.
Fulbright Commissions and Foundations and Public Affairs Sections of U.S. Embassies:	The organizations outside the United States that recruit and nominate scholars for awards to the FSB and provide pre-departure services and counseling to scholars. Many commissions also administer grants for scholars from their countries, including issuing grant documents and grant payments.
Council for International Exchange of Scholars (CIES):	A division of the Institute of International Education (IIE) and a private, nonprofit organization that administers the Fulbright Scholar Program through a cooperative agreement with the U.S. Department of State. CIES provides services to all scholars during their stay in the United States including enrollment in insurance, guidance on immigration matters and facilitation of enhancement programs.
Host Institution:	A U.S. institution that has agreed to host a Fulbright Visiting Scholar during the grant period. A faculty associate at the institution, or in some cases the office of international programs, serves as the primary contact for the scholar.

3. Grant Document and Grant Dates

Your grant document describes the benefits and details of your award. Be certain to read the grant agreement and the terms and conditions of the award thoroughly. Sign your grant document and return it to the Fulbright organization from which you received it as soon as possible prior to your departure from your home country. You should also bring a copy with you to the United States for reference during the year. If you have any questions, consult either the Fulbright organization in your country or CIES.

Your grant period begins on the date you arrive at your host institution to begin your grant activities. The stipend payment schedule is also calculated from that date. U.S. government fiscal regulations permit grant payments only for the period you are in the United States. If you must travel outside the United States during your grant or leave before the date your grant period expires, you are required to inform both CIES and your host university in advance (see sections 24 and 28 for further details.)

4. Grant Benefits

Basic benefits to Fulbright Scholars generally include

- round-trip travel from your home country to the institution of affiliation in the United States,
- either full or partial support in the United States for maintenance and
- accident and sickness coverage for the period of the grant.

5. Grant Payments and Stipends

Grant Payments and Stipends Issued From the Home Country

If your grant payments are issued from the Fulbright organization in your home country, they are subject to that organization's instructions, guidelines and schedules. If necessary, you should communicate with that organization (before departure for the United States) about how your grant payments will be issued.

Grant Payments and Stipends Issued by CIES

Most scholars paid by CIES receive a monthly stipend and professional, settling-in and dependent allowances, if applicable. However, some Fulbright organizations have different payment plans that do not include all of these allowances. Your grant document indicates which of these allowances you will receive.

CIES must receive your signed grant document before sending your first grant payment. In order to ensure your payment is not delayed, be sure to sign your grant document and return it to the Fulbright organization from which you received it as soon as possible.

Monthly stipend: Covers food and housing, local transportation and incidental expenses. Scholars who are paid by CIES receive grant payments every three months from the beginning of their grants. The U.S. Department of State sets stipend rates based on the location of the host institution.

Professional allowance: A one-time allowance that is added to the grant payment to help cover the cost of

- educational and professional materials,
- photocopying,
- laboratory and registration fees,
- computers or computer time, and
- travel to and from professional meetings or to other U.S. academic institutions to consult with colleagues.

Settling-in allowance: A one-time allowance that is added to the first grant payment intended to help cover the cost of temporary housing and items that you need to set up a household after arriving in the United States.

Dependent allowance: Intended to help cover the cost of insurance for your accompanying dependents (spouse or an unmarried child under 21 years of age). You are only eligible for this allowance if dependents are with you at least 80 percent of the grant period. If your dependent stays less than 80 percent of the grant period, you are not eligible for a dependent allowance. The amount of the allowance is determined by the number of dependents and the length of the grant.

Part II: Preparing to Leave for the United States

6. Pre-departure Checklist

This checklist may help you organize your departure from your country and your arrival in the United States.

- ☐ Obtain or update your passport and any accompanying dependents' passports (Section 7).
- ☐ Complete and submit your Medical History and Examination Form to the Fulbright organization in your home country if you have not already done so (Section 13).
- ☐ Obtain from the Fulbright organization in your home country, Form DS-2019 for you and any accompanying dependents (Section 7).
- ☐ Sign and return your grant document to the Fulbright organization from which you received it (Section 3).
- ☐ Apply for your J-1 visa and your accompanying dependents' J-2 visas (Section 7).
- ☐ Contact your faculty associate (Sections 9 and 10).
- ☐ Obtain international air tickets and find out about baggage allowances (Section 8).
- ☐ Inform the Fulbright organization in your home country and your faculty associate at your host institution of the following:
 - Your arrival date
 - Your complete itinerary, including all airlines, flight numbers, transfer cities, dates and times
 - The names and number of dependents who will accompany you
- ☐ Research housing options and if possible, finalize long-term housing arrangements (Section 10).
- ☐ If you have not finalized long-term housing, arrange for temporary accommodations (Section 10).
- ☐ Review medical insurance information and purchase insurance for accompanying dependents (Sections 11 and 13).
- ☐ Pack essential items (Section 12).
- ☐ Give CIES contact information to your family (inside front cover).

Sample



Sample J-1 visa

7. Travel Documents

To enter the United States, you must have

- a valid passport,
- Form DS-2019 and
- J-1 visa.

Make sure the information is correct and that your name is spelled the same way on all of your travel documents (passport, Form DS-2019, J-1 visa and airline ticket.)

CIES also recommends that you carry your Fulbright grant document with you.

Passport

Make sure the expiration date on your passport is ***at least six months beyond the end date of your grant.***

Form DS-2019 (Certificate of Eligibility for Exchange Visitor Status)

The Fulbright organization in your home country will provide you with a Form DS-2019 issued by CIES. Please review this form and make sure that all the information is correct and that your name is spelled the same way on your DS-2019 as it is on your passport. The dates on your DS-2019 are the start and end dates of your Fulbright grant. You must present the DS-2019 to the consular officer when

applying for your visa (see a sample Form DS-2019 in Appendix A). If your visa is granted, your DS-2019 will be returned to you in a sealed envelope. You must not open this envelope. You will present it with your passport at your U.S. point of entry. Keep the DS-2019 with your passport at all times. Do not use a DS-2019 issued by your U.S. host institution or any other organization other than CIES.

J-1 Exchange Visitor Visa

You must enter the United States on a J-1 Exchange Visitor Visa issued under the sponsorship of the U.S. Department of State Exchange Visitor Program Number G-1-00005.

If your grant was awarded after you arrived in the United States, or you entered the United States with another program sponsor or have a different visa status, you must be in touch with CIES so that we can determine the appropriate course of action necessary to change your status. You may have to return to your home country and apply for a new visa in order to re-enter the United States as a Fulbright Scholar.

Applying for the J Visa

*You should apply for your J visa at the U.S. Embassy or Consulate in your home country. Although you may apply at any U.S. Consular office abroad, it may be more difficult to qualify for the visa outside your country of permanent residence. **You are encouraged to apply for your visa early to provide ample time for visa processing.*** A personal interview is required of all visa applicants as a standard part of visa processing, and it may take several weeks before you can get an appointment for your interview. The application process can take anywhere from two to 10 weeks or more. A consular officer may also need to get special clearances depending on your academic course of study, nationality or background. This can take some additional time.

Required Documentation for J Visa Applications

Each applicant for an exchange visitor visa must submit:

- An application Form DS-156 (Nonimmigrant Visa Application) and a Form DS-158 (Contact

Sample Form I-94

Information and Work History for Nonimmigrant Visa Applicant). Both forms must be completed and signed. Some applicants will also need to complete and sign Form DS-157 (Supplemental Nonimmigrant Visa Application). [Blank forms are available without charge at all U.S. Consular offices and on the Visa Services Web site (<http://travel.state.gov/visa/index.html>) under Forms]

- A passport valid for travel to the United States. Make sure the expiration date on your passport is **at least six months beyond the end date of your grant period.** (If more than one person is included in the passport, each person desiring a visa must make an application)
- One 2 inch x 2 inch photograph
- A valid Form DS-2019 issued by CIES

J visa applicants must also demonstrate to the consular officer that they have binding ties to a residence in a foreign country which they have no intention of abandoning, and that they are coming to the United States for a temporary period. Applicants may also be asked to show that they have adequate financial resources for themselves and any accompanying dependents. Applicants will be fingerprinted and photographed as part of the visa application process.

Visas for Family Members

Family members who come with you to the United States are called your *dependents*. Your spouse and any unmarried children under the age of 21 are eligible to apply for J-2 dependents' visas. (Other family

members such as parents, brothers, sisters, nieces, nephews, etc. are not eligible for J-2 classification, but may be eligible for B-2 classification to visit the United States as tourists for a maximum of six months.)

If you need J-2 visas for dependents, you must advise the Fulbright organization in your home country as soon as possible. Each dependent must have his or her own DS-2019, whether accompanying you to the United States or arriving separately.

At the Border/U.S. Port of Entry

When arriving by air, the flight attendant will give all non-U.S. citizens a Form I-94 (Arrival/Departure Record) to complete before leaving the plane. At a land border port of entry you will receive the Form I-94 from a U.S. immigration official. The form is a small white card that asks for basic identification information and the address where you will stay in the United States. You must fill out the information on the form exactly as it appears on your passport and DS-2019.

You must present your completed I-94 form to a border inspector along with your passport, visa and sealed DS-2019. You should also have a copy of your Fulbright grant document with you to show the inspector, if requested. The inspector may ask you questions about the purpose of your trip, how long you will be in the United States, and your residence abroad. As part of the U.S. Department of Homeland Security's US-VISIT Program, all exchange visitors will be photographed and fingerprinted by a border inspector (more information about the US-VISIT Program can be found in Appendix C). The inspector may send you to a second inspection area for further review or issuance of needed papers (see Special Registration, below).

When allowed to proceed, the inspector will stamp your passport and DS-2019 and will endorse the I-94 with the date, place of arrival, the "class of admission" (which corresponds to the visa class), the length of time you may remain in the United States, and any special conditions which may apply to your visit.

An I-94 that has been approved by a U.S. border inspector proves that you arrived in the country legally. ***The I-94 — not your visa — indicates when you must leave the United States.*** On this card, the immigration inspector writes either a date or "D/S" (duration of status). If you have "duration of status" written on your I-94, you may remain in the United States as long as you pursue authorized grant activities (effective through the end date on your DS-2019). Your I-94 form should be annotated "J-1 D/S"; your dependents' forms should be annotated "J-2 D/S."

The inspector keeps the arrival portion of the I-94 form and returns the endorsed departure portion to you. Keep the original in your passport. Once you arrive at your destination, make a copy to keep on your person for the duration of your grant.

Do not lose the I-94. You will need it when you leave the country. When you leave the United States, you must surrender the original departure portion of the I-94 to the airline representative when traveling by air, or to the immigration or customs officer if you cross at a land border to Canada or Mexico. Turning in the I-94 to the proper authorities when you leave the country proves that you did not violate U.S. laws by staying in the country too long. Proof that you are willing to obey U.S. immigration laws will be very important if you want to return to the United States in the future. If your I-94 is lost, stolen, or mutilated you must apply directly to the U.S. Citizenship and Immigration Services (USCIS) using Form I-102 (Application for Replacement/Initial Nonimmigrant Arrival/Departure Record) to replace it. You can download Form I-102 from the USCIS Web site (<http://uscis.gov>) and submit a personal check for \$155 with this application. CIES cannot reimburse you for this cost.

Special Registration

In some cases, either the consular officer in your home country or the immigration inspector at your port of entry will advise you that you require additional screening. If the immigration inspector does not notify you that this special screening applies to you, no additional action is needed on your part. If you are subject to special registration, please notify CIES when you report your arrival so that we can assist you in meeting other special registration requirements that may be expected of you.

8. International Travel

Airline Tickets

As part of your grant benefits, the Fulbright organization in your home country will either arrange your international travel or tell you how to arrange it. All air travel paid for with U.S. government funds must conform to the Fly America Act, which requires all such travel be on American Flag Carriers where such service is available.

Before you leave your home country, please examine your ticket for the following:

- Is the ticket valid for the period of your grant?
- Does the ticket have any restrictions on its use?
- Does your name appear exactly the same way on your ticket as it does on your passport and other travel documents?
- Is your return ticket reserved for a specific date or flight number or is it an open ticket?

If it is necessary to make your own travel arrangements, it is very important to understand the restrictions and possible penalties associated with the ticket you purchase. Many of the cheaper fares are nonrefundable and changes in dates or flights are either not allowed or allowed only by paying a penalty. Ask your travel organization for specific details.

Be sure to have your travel agent check any transit visa requirements and make appropriate arrangements.

When booking travel for your dependents, be aware that J visa regulations prohibit J-2 dependents from

entering the United States ***before*** the J-1 visa holder. J-2 visa holders can only enter the United States with you or after your arrival.

If you plan to travel within the United States during your grant, you might want to ask a travel organization in your country about special “Visit USA” fares, which permit travel around the United States at greatly reduced rates. You must purchase these tickets before you leave home and they cannot be changed easily.

Baggage Allowances

Refer to your grant document or contact the Fulbright organization in your home country to learn whether an excess baggage allowance is provided as a grant benefit. If it is not provided, your baggage is limited to the allowance set by the airline on which you travel. Each airline has different rules, and the rules change frequently. Excess baggage charges can be costly. Please check with your airline before you pack for your trip.

Customs

For customs information, please refer to the most current information, which you can access at <http://www.cbp.gov>. A summary of pertinent customs information is in Appendix B.

9. University Affiliation and Communication With Faculty Associate

In some countries, Fulbright organizations or scholars arrange or confirm scholar placements at U.S. host institutions. In all other cases, CIES will arrange an appropriate affiliation and obtain visiting scholar privileges for scholars. These privileges usually include use of the library, consultation with faculty and limited auditing of courses. However, access to university facilities varies from campus to campus.

Private office space and computers are often not available. While it is likely that you will have access to computer laboratories at your host institution, you should not assume that a computer will be available for your individual use. If a computer is necessary for your work and you do not wish to share one, you should be

prepared to rent or buy a computer, using your professional allowance and/or personal funds.

The affiliation has been arranged in order for you to carry out the project outlined in your Fulbright application. You must get approval from CIES before making any substantive changes to your academic program.

When arranging university affiliations, CIES asks that a faculty associate be named for each scholar. The faculty associate is an academic colleague who

- helps you with professional matters and usually with personal questions and
- provides information about relevant professional activities on and off campus.

It is essential that you correspond with your faculty associate before you leave home. Be sure to tell him or her in further detail about your academic interests as well as your travel plans. You can also request more detailed information about the facilities that will be available for your use on campus.

10. Planning to Arrive in the United States

Plan to arrive in the United States as near as possible to the date recommended by your host university.

This date may be a week or two before your grant start date, which will give you time to find housing.

Housing

You must make your own housing arrangements; CIES cannot assist you in this process. If you have not already received information on housing from your U.S. host institution, contact your host university for information on housing options well in advance of your departure. Finding suitable accommodations in many U.S. cities is difficult. CIES advises you to inquire several months ahead. It may be necessary to stay in temporary accommodations for a few days or weeks until you can find long-term housing. Please bring adequate funds in anticipation of this expense.

It is important to make arrangements for housing before you arrive so you will not be searching for a place to live at a time when you have many other

concerns. Many housing resources are available via the Internet. For more information on obtaining accommodations, see the “Housing” section of *Living in the United States*, which accompanies this *Guide*. You may also refer to the “Housing” link on the Fulbright Visiting Scholar Grantee Web page, <http://www.cies.org/vsgrantees> (enter “vsgrantees” as the user name and password). See Section 14 for details on this resource.

11. Dependents

Expenses

Family members who come with you to the United States are called your *dependents*. ***You are responsible for all the costs of bringing your dependents to the United States.*** This includes airfare and other travel expenses, living expenses, school costs, medical insurance and any uncovered medical bills. In some countries, the Fulbright organization will provide airfare for one dependent if the grant is eight months or more and the dependent stays in the United States for at least 80 percent of the grant period. Likewise, some countries include a modest dependent allowance to help offset the cost of insurance for family members. These funds will not be sufficient to support your family without additional personal funds. Do not bring family members to the United States unless you are certain that you will have enough money to support them. To get visas for your dependents (see page 12), you must show that you will be able to support them financially and provide them with medical insurance coverage.

Employment

After coming to the United States, your dependents who are J-2 visa holders may apply to the U.S. Citizenship and Immigration Services (USCIS) for permission to accept paid employment. However, jobs are difficult to get, and obtaining this USCIS permission is not guaranteed. Dependents must have permission from the USCIS before they begin working. ***CIES cannot assist in this process.***

The USCIS will not authorize employment for a J-2 dependent if you indicate that this income is needed to support the J-1 visa holder. Your dependent’s

income is subject to federal income, state income and Social Security taxes. USCIS employment authorization for J-2 dependents remains valid only while the J-1 exchange visitor maintains status.

To request permission for dependents to accept employment, complete USCIS Form I-765 (Application for Employment Authorization), which is available online at <http://uscis.gov>. Mail it with supporting documents and a check for \$175 to the USCIS district director who has jurisdiction in your place of temporary residence in the United States. You may find the mailing address of your local USCIS district director on page 6 of the USCIS Form I-765.

Schooling and Childcare

You are responsible for arranging any necessary schooling or childcare. If any of your family members plan to attend school or study at a university in the United States, bring their academic records with you, including any documents that indicate their proficiency in English. You must have a birth certificate or other proof of age for any child who will be entering school.

You must also have immunization records for any child who is going to enroll in elementary school, secondary school, or college or university. The records must show proof of the following immunizations and tests, indicating specific dates:

- Results of the PPD or Tyne test for tuberculosis
- Diphtheria/pertussis/tetanus
- Measles
- Mumps
- Polio
- Rubella
- Chicken pox

Most U.S. school systems also require a physical examination. You are encouraged to have your children immunized in your home country and to then bring their complete medical history with you to the U.S.

Public schools are not available for children under the age of five. If your spouse or another adult will not be accompanying you to care for your children, you will have to pay someone— a privately run daycare center

or pre-school, or people who provide childcare services (babysitting) in their homes—to care for them on a regular basis. Childcare for young children can be very expensive in the United States, and it is in high demand. Scholars who will require these services should inquire about the availability and cost of these services before arriving in the United States. There may be a childcare center on your university campus, which provides discounts to individuals affiliated with the institution. CIES cannot assist you with enrolling your children in school or childcare.

Medical Insurance for Dependents

The U.S. Department of State provides you with accident and sickness coverage during your grant period. However, ***it is your responsibility to purchase accident and sickness insurance for your dependents on J visas for the duration of their stay in the United States.***

Medical care in the United States can be extremely costly, and it is essential that your accompanying dependents are adequately insured. Dependents who do not have medical insurance for the duration of their stay in the United States are in violation of the terms and conditions of the Fulbright award. This may result in termination of your grant.

Accident and sickness insurance for your dependents must meet the following guidelines as specified in the J Exchange Visitor Program regulations. At minimum, the following benefits must be provided:

- Medical coverage of at least \$50,000 per person per accident or illness
- Repatriation of remains in the amount of \$7,500
- Medical evacuation benefits of at least \$10,000
- A deductible that does not exceed \$500

Options for Coverage

You may purchase insurance for dependents from the company of your choice, provided that the coverage meets the J visa regulations outlined above. This section provides an overview of several options for you to obtain medical insurance coverage for your accompanying dependents. You should research and compare multiple options because the costs and

benefits may vary considerably. Information on different options is provided to help you with your search, however, the Fulbright Program does not endorse any one particular option.

Insurance Plan in Your Own Country

You may purchase insurance for your dependents in your own country before you leave. If you do, it must

- be from a reputable company (either highly rated by international standards or backed by your government) and
- provide benefits that meet the J-visa requirements.

Insurance Coverage Through Your Host University

Your dependents may be eligible for insurance coverage through your host university's insurance plan. Some U.S. universities might require dependents to enroll in the university's medical insurance plan. Contact the office of international programs at your host campus to determine if this applies to you.

Other Insurance Plans

Appendix F lists a number of companies in the United States with health insurance plans that meet the J Exchange Visitor Program requirements. Please note that this list is for informational purposes only; it does not represent any endorsement by the Fulbright Program. It is a good idea to thoroughly compare benefits and prices of at least two plans.

Dependent Insurance and Pregnancy

Many insurance policies designed for J-2 visa holders do not cover pregnancy-related care. If an accompanying dependent could become pregnant during your grant, you should carefully review the benefits of the insurance policy you are selecting to make sure that it covers pregnancy. If the policy you purchase does not cover pregnancy, you will be responsible for all costs associated with your dependent's prenatal care and delivery. Though some policies (see Appendix E) will cover pregnancy if conception occurs during the coverage period, the Fulbright Program has been unable to identify any insurance policies for J-2 visa holders that cover a pre-existing pregnancy. If your accompanying dependent is already pregnant when your grant begins, be aware that it will be very difficult for you to find an insurance policy that will cover her

prenatal and maternity care. If you are not able to find such a policy, you should seriously consider whether you will be able to afford prenatal care and delivery of a child in the United States as you will be responsible for any and all expenses incurred. Be sure to consult with your airline to find out what restrictions it has about flying during the third trimester. The Fulbright Program cannot assist you with any bills related to a dependent's pregnancy or birth of a child.

12. What to Bring

Essentials

In addition to clothing and other personal items, you should bring the following:

- ☐ CIES publications included in your grant packet: *This Guide* and *Living in the United States*
- ☐ Your passport and accompanying dependents' passports and DS-2019(s)
- ☐ Your signed grant document
- ☐ A birth certificate or official document stating the date of your birth if your date of birth is not shown on your passport. You must have this proof to get a Social Security Number
- ☐ Birth certificates or other official documents stating the date of birth for children who will be entering school (see Section 11)
- ☐ Medical, dental and academic records (see Section 11) of any dependents who will be enrolling in school
- ☐ A supply of medications for existing medical conditions. ***Prescriptions from abroad cannot be filled in the United States***
- ☐ A physician's description of any prescribed medications. You can then consult a U.S. physician for a prescription, which you can then have filled in the U.S.
- ☐ An extra pair of eyeglasses or contact lenses
- ☐ Your U.S. Social Security Number (SSN) or an Individual Taxpayer Identification Number (ITIN)



Other Useful Items

You may also wish to bring these items with you:

- Copies of your curriculum vitae
- Reprints of professional articles you have written
- Personal computer or laptop (you may need to bring a transformer or purchase computer cords that will make your computer compatible with the 110-volt electrical current used in the United States)
- Slides, photographs and maps of your country, which can be used in informal talks you may be invited to give
- Small, inexpensive souvenirs, like craft items from your country, which make welcome gifts to colleagues and hosts

You may omit most household items, such as linens and cooking utensils, because they can be purchased in the United States at a reasonable cost.

13. Medical Insurance

One of the benefits of your Fulbright grant is insurance coverage for accidents and sickness. This section details the benefits and limitations of your coverage and provides useful advice on obtaining supplemental coverage. Should you need to visit a doctor during your grant period, see Section 21, "Going to the Doctor."

Completion of Medical History and Examination Form

You must submit a completed Medical History and Examination Form to the Fulbright organization in your home country at least two months before departure for the United States. The Fulbright Program recommends that you have up-to-date immunizations for all of the diseases listed on the form. Although no inoculations or vaccinations are required for entry into the United States, some universities will require them.

Medical Insurance Requirement

Your Fulbright grant includes coverage for the grant period only through the Accident and Sickness Program for Exchanges. You must purchase insurance for yourself any time that you are in the United States before or after the grant period, anytime that you are outside the United States during your grant period and for your accompanying dependents for the duration of their stay in the United States. (See page 20 for details on obtaining supplemental insurance.)

Medical Checkup

Since the insurance provided by your grant does not cover the cost of eye examinations, eye glasses, contact lenses, or dental examinations, you are advised to receive eye and dental exams prior to coming to the United States. You should complete any necessary treatment before you leave home.

Scholar Health Coverage: The Accident and Sickness Program for Exchanges

The U. S. Department of State provides essential accident and sickness coverage for Fulbright Scholars under a self-funded group policy called the Accident and Sickness Program for Exchanges (ASPE). This policy is not intended to cover preventative care such as annual exams or check-ups.

Your ASPE insurance policy is administered by:

ACS Healthcare Systems

P.O. Box 33729 Indianapolis, IN 46203-0729

Telephone: 1.800.299.8742 (toll-free) or
317.614.2000

Fax: 317.614.2001

Web site: <http://www.onlinehealthplan.com>

Insurance Identification Card

Prior to your arrival, CIES will mail a packet of information including your insurance identification card to you in care of your host institution (see Section 14). The complete ASPE brochure will be included in this packet and may also be found online at <http://exchanges.state.gov/aspe/aspebrochure.pdf>. Key sections of the brochure (General Information and Limitations of Benefits) are reproduced in Appendices D and E of this *Guide*.

Even if your insurance card has not been issued, coverage begins at the time you depart your home country, provided that you travel directly to the United States to commence your Fulbright activities. If you choose to arrive in the United States prior to your grant start date in order to travel within the United States or set up housing, your coverage will begin when you report to your host institution to begin your grant activities. Your coverage continues while you are in the United States until you return to your home country, provided you return home immediately after your grant end date. If you wish to remain in the United States for up to 30 days beyond your grant end date (see “Grace Period” on page 35), you will not be covered by the ASPE insurance policy during this period.

If your grant is amended to either shorten or extend the length of your program, CIES will adjust your insurance coverage accordingly.

Amount of Coverage

You will pay a portion of the expenses for each illness or medical emergency; this portion is called the *deductible*. Under ASPE, the deductible is \$25 per accident or illness. The ASPE policy pays the rest of the expenses incurred, up to \$50,000 for each illness or injury sustained.

If you keep your health insurance, the ASPE policy pays benefits after your other policy has paid its full benefits.

If a scholar dies, the ASPE policy pays up to \$7,500 for the repatriation of remains. This includes preparation and transportation of the body to the home country. It does not include funeral costs, family transportation costs and/or a death benefit.

Illness and Medical Emergency Coverage

The following are covered during the period of grant activity:

- **Periods of academic recess.** All customary holidays and travel during these periods as long as you remain within the United States.
- **International travel that is contained in your original grant and/or research design.** You must have U.S. Department of State pre-approval to

travel outside the United States for research purposes. If you do not have such approval, your coverage will end the day you leave the United States and will be reinstated when you return.

- **Medical expenses at both ends of a medical evacuation (*medevac*).** For example, hospital costs in the United States before medevac and hospital costs in the home country after medevac are covered. In most cases, your return airline ticket can be used to pay the transportation cost of a medevac. Medical evacuations must be approved as an emergency by the U.S. Department of State in advance to qualify for funding and are considered on a case-by-case basis. To qualify as an evacuation, the travel and any required special accommodations must be authorized by a medical doctor.
- **Medical expenses for an injury that occurs or an illness that begins during the grant period.** Expenses are covered for up to 52 weeks from the date of the injury or the onset of the illness, up to a maximum of \$50,000.
- **Pregnancy and natal care.** Expenses are covered for the J-1 visa holder. Pregnancy is not subject to the 52-week extension of benefits. Your policy covers any sickness or problem the newborn may have during the first 31 days, but it does not include a routine checkup for the baby during that period. After the first 31 days of life, you must purchase an individual dependent policy for the infant.
- **Prescriptions.** The ASPE health care plan provides a prescription drug program to be used in combination with your health care benefits. Medco Health and its subsidiary, PAID Prescriptions, have a local and chain pharmacy network that contracts with pharmacies nationwide. Your ASPE identification card also serves as your prescription drug card. Simply present your card to have your prescriptions filled at any one of the network pharmacies in your area free of charge for covered medications. The pharmacy will then electronically transmit a claim for that medication and, within minutes, have approval for filling the prescription.

Limitations

The ASPE plan is not all-purpose health insurance and is subject to specific limitations. It is very important to understand the exceptions and limitations of coverage to avoid incurring personal liability for medical expenses. The policy's exact language on limitations of scholars' coverage is provided in the ASPE brochure and excerpted in Appendix E. Additional explanation is provided in this section.

- **Personal travel or interruptions in the grant activity.** You are not covered during diversionary travel or personal stopovers that you make while you are traveling either from your home country to your U.S. host institution or back again. You are not covered for travel of any kind to a third country unless the travel is in your original grant and/or research design and you have prior authorization from the U.S. Department of State.
- **pre-existing conditions.** The ASPE insurance does not cover treatment and/or medical evacuation for *pre-existing conditions* (that is, any medical problem that is known to have existed, or is caused by a condition that existed, before the grant period began) such as high blood pressure, heart disease, etc. If you have such a condition, you are urged to retain or obtain your own insurance to cover ongoing or potential medical requirements related to the condition for the duration of the grant period. Pregnancy is not defined as a pre-existing condition for scholars.
- **Long-term treatment and convalescence.** Long-term treatment and convalescence are not

covered. If you require extensive treatment or convalescence, you are urged to return home for treatment as soon as your attending physician says your condition has stabilized and you can be released for travel.

Supplemental Insurance

ASPE is not intended to replace insurance you may already have. It has a maximum benefit of \$50,000 per accident or illness. If you want coverage for situations or conditions that are not covered by ASPE, you should keep any private insurance you may already have, purchase coverage through some other plan or both. If you choose to maintain an existing plan or purchase another policy, you will not be reimbursed for this expense.

Several insurance companies offer supplemental insurance policies. For details, contact the insurance companies listed in Appendix F. The Fulbright Program does not endorse any particular plan.

Mandatory University Insurance

At some U.S. host universities, Fulbright Scholars are required to enroll in the university's insurance program because the university believes the coverage it provides is more comprehensive than the coverage provided by the Fulbright Program. In such cases, you are responsible for paying the premiums; neither the U.S. Department of State nor CIES can reimburse you for these amounts.

When such a requirement exists, either the host university or your CIES contact person will inform you before an affiliation is made.

Part III: When You Arrive in the United States

14. What to Send to CIES

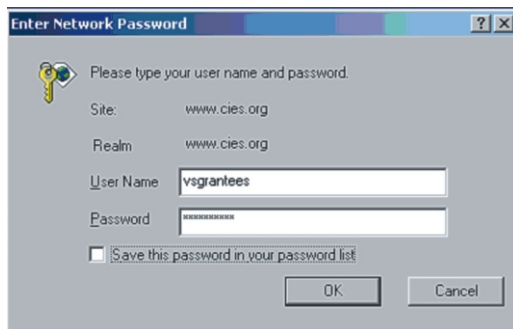
CIES will send a packet of arrival information for you in care of your faculty associate before your arrival. When you report to your host institution, ask if any mail has been sent for you.

Within three days of your arrival, you must call or email your contact person at CIES. Within 10 days of your arrival, you must complete and return to CIES the Notification of Arrival Form, along with supporting documents as requested on the form. The Notification of Arrival Form (Appendix G of this *Guide*) is also in the arrival packet and can be found on the CIES Visiting Grantee Web page (see box below). Do not wait until you have a permanent address to send in this form.

CIES will send all correspondence in care of your faculty associate until you indicate otherwise. If your residential address or your preferred mailing address changes, please inform CIES by phone or e-mail within 10 days.

Visiting Grantee Web Page

CIES has created a grantees-only Web page with information specific to Fulbright Visiting Scholars: <http://www.cies.org/vsgrantees>. This is a password-protected page. The user ID and password are both "vsgrantees". This site has a wealth of information and links to assist you throughout your grant period. If you have ideas for additions to the Web page, please contact the CIES webmaster at cieswebmaster@cies.iie.org.



Submit the following forms and information to CIES:

- ☐ Notification of Arrival Form and the following supporting documents within 10 days of your arrival:
 - Photocopies of stamped Forms DS-2019 for you and your dependents
 - Photocopies of Forms I-94 for you and your dependents
 - Photocopies of U.S. visas in your passport and your dependents' passports
- ☐ Photocopy of Social Security Number (SSN) card or Individual Taxpayer Identification Number (ITIN) card as soon as available
- ☐ Tax Form W-4 (Employee's Withholding Allowance Certificate) or Tax Form W-8BEN (Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding) if applicable. CIES will send the appropriate tax form with your arrival packet. (Send with the photocopy of your SSN or ITIN card as soon as available.)
- ☐ Any changes to your residential or preferred mailing address, e-mail address and/or phone number during your grant period within 10 days of each change

15. Obtaining a Social Security Number or Individual Taxpayer Identification Number

Every person who receives income in the United States is identified by either a Social Security Number (SSN) or an Individual Taxpayer Identification Number (ITIN). These are unique personal identification numbers, widely used in the United States. If you receive income from CIES or another U.S. source, you must obtain either an SSN or an ITIN.

Even if your grant payments are issued by the Fulbright organization in your home country, CIES recommends that you obtain an SSN or ITIN. Since the Occasional Lecturer Program (see Section 22) is a U.S. source of income, you must obtain an SSN or ITIN to participate in this program.

If you were issued an SSN during a previous stay in the United States, bring your card with you. Otherwise, you should wait to apply for an SSN, 10 days after arriving in the United States. This will allow time for your arrival information to be updated from your port of entry, which will enable the Social Security Administration to verify your immigration status. Send CIES a copy of your Social Security card

as soon as you get it, along with your completed W-4 or W-8BEN tax form.

Applying for a Social Security Number (SSN)

To apply for a Social Security number, you must appear in person at the office of the Social Security Administration nearest your host institution.

To locate your Social Security office, consult the Social Security Administration Web site at <http://www.ssa.gov/locator> or call 1.800.772.1213. CIES cannot assist in the application process.

Take the following documents with you:

- Form SS-5 (Application for a Social Security Card) provided by CIES in the arrival packet or available online at <http://www.ssa.gov/online/ss-5.html>
- Your passport (or other official document giving your date of birth)
- Form DS-2019
- Form I-94
- Support letter from CIES (from your arrival packet)

The application form asks for the name of the applicant's father and the *maiden name* (name before marriage) of the applicant's mother. When completing the application, note that it is extremely

Primary Purposes of the Social Security Number or the Individual Taxpayer Identification Number

- *Filing U.S. and state income tax returns, even if you are exempt from paying taxes. If you do not have a number, tax returns will not be accepted, and refunds will not be issued.*
- *Claiming tax refunds.*
- *Use by the organization that pays you. Many organizations use the Social Security number as a personal identification number for generating stipend and reimbursement checks.*
- *Claiming benefits under an income tax treaty (scholars from tax treaty countries).*
- *Identifying yourself on all correspondence with the Internal Revenue Service (IRS) about your taxes.*
- *Having CIES withhold U.S. income tax from your stipends and getting the withheld funds properly credited to your tax account.*
- *Obtaining a driver's license, in some states.*
- *University records and access to campus services (some universities are able to issue a scholar ID number instead of using a Social Security number).*

important that you write your name on your application exactly as it appears on your passport.

If you were previously issued an SSN, but have lost the card or no longer know the number, you must complete Form SS-5 to request a duplicate card. When you fill in the form, you must check “yes” in item 10 to indicate that you have already filed for or received a Social Security card. If you know the number and the name on the card you were issued previously, you should list them in items 11 and 12. Then follow the instructions as you would to apply for an original card. Your duplicate card will have the same name and number as your previous card. If the spelling of your name on your previously issued SSN card differs significantly from that of your current passport, you may want to apply for a new SSN card with the updated spelling. In order to do this, submit Form SS-5 as if you were applying for a lost card, along with a document showing the spelling of your old name (original SSN card) and one with the new spelling (e.g., passport). Your corrected card will have your new name and the same number as your previously issued card. For more information on replacing a lost card or obtaining a corrected card, see <http://www.ssa.gov/replace/sscard.html>.

Applying for an Individual Taxpayer Identification Number (ITIN)

If your local Social Security office will not accept your application for a Social Security Number, you should request a letter of rejection. You will then need to obtain an ITIN from the Internal Revenue Service (IRS).

To apply for an ITIN, you should go to your local IRS office and complete Form W-7, Application for IRS Individual Taxpayer Identification Number.

The form is available online at <http://www.irs.gov/pub/irs-pdf/fw7.pdf>. To locate your IRS Taxpayer Assistance Center, consult their Web site at <http://www.irs.gov/localcontacts/index.html>. You will need to take with you the same documentation that is required to obtain an SSN and your letter of rejection for a Social Security Number. Once you have received your ITIN, you must send a copy of it to CIES.

Note: If you have been issued an SSN, you do not need to apply for an ITIN.

16. Grant Payments

If your grant was issued by the Fulbright organization in your home country, consult your contacts there to find out about your payment schedule. For all other scholars, CIES issues stipend payments. The first payment will include the first three months of your monthly stipend and any allowances to which you are entitled. The first stipend payment is sent to your faculty associate to hold for you. ***After the first payment, no other payment will be issued until CIES has received a copy of your SSN/ITN or confirmation that you have applied for one.***

Scholars who are paid by CIES receive grant payments every three months from the beginning of their grant. CIES will make subsequent payments, if applicable, to the preferred address you indicated on your Notification of Arrival Form.

You should receive your payment in the first week of the month in which it is due. If you have not received your payment by the 5th of the month, please inform CIES.

CIES sends payments by check but is currently testing a system of issuing scholar payments by debit card. If this system changes in the future, your CIES contact person will notify you.

17. Banking

In the United States, many purchases are made by personal check or credit card. In order to use either, you will need to establish a bank account as soon as possible after your arrival. When you talk to your banking representative about opening an account, you can talk to him or her about opening a checking and/or savings account as well as the possibility of obtaining a credit card. Before opening an account, it is recommended that you call or visit several banks to determine the variations in their services and charges. When comparing banks and services, be sure to ask whether you must maintain a minimum balance to avoid service charges and whether you can have an interest-earning checking account.

To open a bank account in the United States, you will need two forms of identification (such as a passport or driver's license) and funds for your first deposit. Some banks may also require a Social Security Number to open an account.

Although banking policies vary throughout the United States, it usually takes five to 10 days for a check to be processed. During that time, you may not be able to withdraw these funds from your account.

18. Renter's Insurance

Renter's insurance covers the value of your personal property against theft or damage both in your home and while you are away from home. While you receive accident and sickness insurance as a benefit of the grant, the Fulbright Program does not provide insurance for your personal possessions. You may want to purchase renter's insurance to cover valuable possessions such as computers and other electronics, bicycles, jewelry, clothing and furniture.

Protection under renter's insurance policy is often comprehensive. For example, if your laptop computer is stolen from your apartment, on campus, or from your car, a renter's policy would cover the replacement costs. However, you are only protected from hazards specifically listed in the policy you purchase. These typically include fire, smoke or lightning; windstorms or hail; explosion or electrical surge damage; riot or civil commotion; vandalism or theft. It is wise to look for policies providing replacement value coverage, which will reimburse you for the replacement value of your damaged or stolen property, rather than for the property's current (usually lesser) value. You should expect to pay a deductible; choosing a higher deductible can lower the overall cost of your policy.

Renter's insurance is relatively inexpensive. The

average cost of renter's insurance is under \$20 a month. Rates vary depending on coverage and your location and the amount you want to cover. A list of insurance companies can be found in the yellow pages of your telephone directory.

19. Settling In

The checklist below may help you prioritize what you need to do upon arrival in the United States.

- ☐ Inform your faculty associate of your arrival and pick up your arrival packet of important program information prepared by CIES (see page 21).
- ☐ Submit required forms to CIES (see page 21).
- ☐ Apply for a Social Security Number or Individual Taxpayer Identification Number (see Section 15).
- ☐ Open a bank account (see Section 17).
- ☐ Locate permanent housing (see Section 10).
- ☐ Obtain gas, electricity, water and telephone service as needed.
- ☐ Inquire about rental insurance (see Section 18).
- ☐ Investigate schooling for accompanying children.
- ☐ Identify a doctor, dentist and hospital in case of emergency.
- ☐ If you bring or buy a car, obtain a driver's licence, registration and insurance.
- ☐ Look into opportunities for professional meetings and other enrichment programs (see Section 22).

Part IV: During Your Grant Period

20. General Advice and Assistance

During your stay in the United States, your CIES contact person will be available to assist you whenever possible. A list of CIES staff members can be found on the inside front cover of this *Guide*. If you have questions regarding program policies, feel free to call or e-mail your CIES contact person or explore the Visiting Grantee Web page (see box on page 21).

CIES welcomes your feedback on the progress of your program. Please share with us:

- Special presentations you make to university or community groups; attendance at conferences related to your program
- Newspaper clippings and photographs related to your grant
- Any important problems with your research or lecturing program
- Health problems
- Any legal issues you may encounter while on your grant
- Major changes in your personal status such as marriage, divorce or the birth of a child

Additionally, you are **required** to notify CIES of the following circumstances in a timely manner:

- Your dependents' arrival in the United States
- Change in residential or mailing address
- Any international travel
- Plans for departure from the United States

Lastly, you must obtain approval from the U.S. Department of State through CIES in advance for the following:

- Employment/Honoraria (see Section 23)
- Extension of stay (see Section 29)
- Transfer of sponsorship (see section 29)

For information and advice about academic and campus matters, consult your faculty associate and your host institution's office of international programs.

21. Going to the Doctor

If you require medical attention during your grant, you must find a physician within the ASPE policy directory and make an appointment. To identify a participating physician or facility, you may use the Provider Directory on the ASPE policy Web site (<http://www.onlinehealthplan.com>), or call the toll-free number on the back of your insurance card (1-800-726-0766). Choose a physician based on the area of specialized medicine and/or the proximity of the office to your residence or campus. When you call the physician's office to make an appointment, be sure to re-confirm that they accept the ASPE insurance policy, which is part of the CCN health plan.

At the time of your appointment, take your medical insurance identification card and an insurance claim form with you. You can download claim forms from the ASPE policy Web site. The doctor's office or hospital you choose will help you fill out the form. They will advise whether you should pay for the care at the time of your visit and be reimbursed later by the insurer, or have the doctor's office or hospital submit the bill to the insurance company for reimbursement.

You should visit a hospital emergency room only when there is a medical emergency, which is defined as treatment for serious conditions (see Appendix E). For all other conditions, you should schedule an appointment with your physician. ***If you are hospitalized for a serious medical condition, you must inform your CIES contact person as soon as possible.***

22. Professional and Personal Enrichment Activities

In order to experience the broad diversity of U.S. higher education, you are encouraged to take advantage of opportunities to visit colleges and universities other than your host institution while you are in the United States. You may also be interested in attending a professional meeting or conference during your stay in the United States.

Twice each year (in February and August), *The Chronicle of Higher Education* prints a special section titled “Events in Academe,” a comprehensive list of academic meetings and conferences. You can find *The Chronicle* in your university library or on their Web site at <http://www.chronicle.com>.

The Occasional Lecturer Program (OLP)

CIES widely distributes the *Directory of Fulbright Visiting Scholars* to U.S. colleges and universities annually. CIES encourages them to invite visiting scholars to spend a few days on their campuses to give lectures and seminars to students, faculty and the general public, or to present at campus-sponsored conferences.

The Occasional Lecturer Program (OLP) provides travel awards for visiting scholars who are invited to give formal presentations at U.S. colleges and universities during the period of their grants. You may apply to the OLP through CIES with the application provided in Appendix J at the back of this *Guide*. You can access an online version of the application on the Visiting Grantee Web page. If you have additional questions about the OLP, please contact the OLP staff member listed under “Special Programs” on the inside front cover of this *Guide*.

OLP Travel Awards

Travel awards for guest lecturing under the Occasional Lecturer Program are available, but these funds are limited. Funds are available only for travel within the United States including U.S. territories.

CIES encourages you to include two or more lecturing activities in a single trip, which may include visits to more than one campus. Requests are considered on a first-come, first-served basis, and CIES cannot guarantee that every request will be honored.

CIES encourages you to seek invitations to speak at Minority Serving Institutions (MSIs), such as Historically Black Colleges and Universities (HBCUs), Hispanic Serving Institutions (HSIs) or Tribal Colleges. A list of MSIs can be found at <http://ed.gov/about/offices/list/ocr/edlite-minorityinst.html> and is also posted on the Visiting Grantee Web page at www.cies.org/vsgrantees (see box on page 21).

The OLP staff must approve your request for a travel award before you go on your trip. If the OLP staff approves your request, CIES will issue your travel award payment after you have completed your trip and you have submitted your evaluation form.

In order to receive OLP funds, CIES must have your SSN or ITIN and W-4 or W-8BEN (please refer to Section 15 for details).

CIES calculates award amounts as follows:

- Distance is calculated using your U.S. residential address as the starting point and the address of the lecture site as the destination
- Mileage is determined one way, based on the most direct route, regardless of your chosen method of travel
- If you give lectures in more than one location, distances are calculated to each destination sequentially
- \$250 awards are made for distances of 75-499 miles
- \$500 awards are made for distances of 500-1999 miles
- \$750 award are made for distances of 2000 miles or more
- No awards are granted for distances of less than 75 miles

You and your OLP host are responsible for all other expenses including lodging, food, any additional travel costs and local transportation such as taxis or buses to and from airports. If the OLP host pays for these expenses directly, or reimburses you for the costs, you may accept this payment without prior approval from CIES.

Instructions for Requesting a Travel Award

As early as possible before the proposed trip (at least 30 days in advance):

1. Obtain a formal letter of invitation.
2. Complete the Occasional Lecturer Program Award Application Form (photocopy from Appendix J or complete online on the Visiting Grantee Web page at <http://www.cies.org/vsgrantees>). The form provides full instructions.
3. Mail, fax (202.362.3442) or e-mail (olp@cies.iie.org) the paper application form and letter of invitation to

the Occasional Lecturer Program, or submit the application electronically using the online application available on the Visiting Grantee Web page and forward the invitation separately.

Within two weeks of receiving your materials, CIES will inform you of the status of your request. If it is approved, you will receive an Occasional Lecturer Evaluation Form (Appendix K). Within one month after your trip, complete the Evaluation Form and return it to CIES. CIES will mail your travel award payment to you within four weeks of receiving your evaluation.

Fulbright Metropolitan Area Enrichment Programs

With the assistance of a grant from the U.S. Department of State, CIES sponsors six metropolitan area enrichment programs, which organize a variety of cultural and social events for Fulbright Scholars who are affiliated at host institutions in the following metropolitan areas: Boston, Chicago, Los Angeles, New York, San Francisco and Washington, D.C.

If you are affiliated with an institution in or near one of these cities, you can expect to receive regular program mailings from the local coordinator. If you do not hear from the coordinator in your area, please feel free to contact the coordinator to be sure your name is on his or her mailing list. If you are based in another area but plan to visit one of these cities, you are also encouraged to contact the coordinator in order to participate in any programs that may be scheduled during your visit. Coordinators' names and contact information are listed in Appendix I.

National Council for International Visitors

CIES is a member of the National Council for International Visitors (NCIV), a federation of community organizations that administer a range of educational, cultural and social programs, including classroom visits, special events of international interest, home hospitality, and meetings with professional counterparts. In addition, these organizations are excellent resources to learn more about local attractions, transportation and accommodations. A list of NCIV services offered and their affiliates in more

than 100 cities and towns may be obtained by calling 1.800.523.8101 or visiting <http://www.nciv.org>.

CIES encourages you to take advantage of NCIV resources and participate in their activities, especially if you are not in an area that has a metropolitan enrichment program.

Fulbrightweb.org

Fulbrightweb.org is an online community bringing together Fulbright Scholars, Fulbright Students, alumni and the program's professional support network worldwide. We urge you to register and become part of the Fulbright family. Visit <http://www.fulbrightweb.org> to register and fill out the short online information form.

Benefits of registering include:

- The "My Profile" feature that allows you to personalize your own Web page (upload photos, favorite links, hints and reminders, personal pals list, messages and alerts, upcoming events, and a keyword search for the Fulbright directory of other Fulbrighters)
 - A free lifetime Fulbright e-mail address that can be accessed through any Web browser
 - The "Fulbrighters News" pages that keep other Fulbrighters up to date on your Fulbright experiences, life, family and career
 - The "Fulbrighters Library" that allows you to share books, articles or research papers you've written or stories of your Fulbright experience.
 - The ability to post messages on the bulletin board and a gateway for participating in scheduled chat sessions
- CIES schedules regular chat sessions and targeted discussion forums. We will notify you of opportunities in which we think you will be interested. We encourage you to let the Fulbrightweb.org Webmaster know of any discussion topics you think would be interesting.

23. Employment/Honoraria

As a researcher or lecturer holding a J-1 visa, you may engage in paid employment if it is consistent with the Fulbright Program purpose and if it is related to your

project. Such employment must be approved in advance by the U.S. Department of State. The Department of State will not approve employment requests that would delay the end date of the grant period. Ongoing lecturing and consulting opportunities are considered paid employment when you receive funds in excess of your grant. You must report any payment received as income on your tax return.

Obtaining Approval to Accept Wages or Income

- Submit requests at least one month before the intended employment activity will begin.
- Submit requests to your CIES contact person.
- Submit the following three letters:
 - A letter of invitation from the institution that invited you to lecture or consult. The letter should state the terms and conditions of the offer, including duration, number of hours, field or subject, amount of compensation and description of the activity.
 - A letter from your faculty associate recommending the activity and explaining how it would enhance your program.
 - A letter from you indicating why you are interested in undertaking the employment activity and how it relates to your grant.
- If your grant is administered by the Fulbright organization in your home country, you may also be required to inform them and obtain their approval if specified in the terms and conditions of your grant.
- CIES will forward the request to the U.S. Department of State for approval. You will receive a written response from CIES once a decision has been made.

CIES considers one-time monetary compensation for participation in a single lecture or academic activity, including OLP, as an *honorarium*. If you would like to accept an honorarium, submit a letter to CIES from the person or department offering it and describe the amount of compensation. You will receive a written response from CIES authorizing you to accept this honorarium. If the only funds you will receive are to

reimburse you for expenses, you may accept this payment without prior approval from CIES.

24. Traveling Outside the United States During Your Grant Period

If you must travel outside the United States, please note the following:

1. ***You must notify your CIES contact person at least three weeks before any international travel.*** Inform your contact person of your planned travel dates, destinations and information on how to contact you abroad. You may need to mail your original DS-2019 (and any dependents' DS-2019s) to CIES for travel validation, which indicates that you remain in program status, before you depart the United States. Check with your contact person to find out if you need to send your DS-2019 to CIES to have it signed. Only a CIES representative can sign your DS-2019 (not the international office of your host institution).
2. It is your responsibility to find out if the country you intend to visit or travel through requires an entry visa. Contact that country's embassy for further information well ahead of the date of your intended visit. (See <http://www.embassy.org> for information on foreign embassies in the United States.)
3. To reenter the United States you must have:
 - **A valid passport.** Make sure your passport is valid ***for at least six months beyond the period of your authorized stay in the United States.*** If your passport needs to be renewed, it is your responsibility to contact your country's embassy or consulate in the United States to renew your passport.
 - **A DS-2019 validated for travel.** If dependents are traveling with you, each J-2 dependent must have a separate validated DS-2019 of his/her own.
 - **A multiple-entry J visa.** Make sure that your visa is valid on the date you will reenter the United States. Please note that obtaining a visa while outside of the United States to reenter the country can be a lengthy and time-consuming process. You must plan ahead and ensure that your documents are both valid and accurate.

4. If your visa allows only a single entry, you used your one entry when you entered the United States. If this is the case, or if your multiple-entry visa has expired, you must renew your visa to gain reentry to the United States. You may renew your visa only at a U.S. Embassy or Consulate abroad and not in the United States. CIES cannot renew visas. Because many U.S. Embassies and Consulates have instituted rigorous visa processing policies, including mandatory interviews of all applicants, we urge you to examine your need to travel outside the United States and determine if it is worth the risk of delay or failure to obtain a reentry visa for the United States. CIES and the Fulbright Program cannot guarantee that your application will be successful or will be processed in a timely fashion. Please be aware of these potential difficulties of traveling internationally and reentering the United States.
5. For visits of less than 30 days to Canada, Mexico or the adjacent islands other than Cuba, you will be readmitted to the United States without a valid visa if you have a valid DS-2019 and I-94. (Adjacent islands are defined as Saint Pierre, Miquelon, the Dominican Republic, Haiti, Barbados, Bermuda, the Bahamas, Jamaica, the Windward and Leeward Islands, Trinidad, Martinique and other British, French, and Dutch territories or possessions bordering on the Caribbean Sea.)

Insurance Coverage Outside the United States During the Grant Period

When you travel anywhere outside of the United States during your grant period, the ASPE insurance will not cover you, unless the travel was included in your initial grant. If your travel is related to your research or lecturing, but was not initially part of your grant proposal, you must get U.S. Department of State approval for ASPE insurance to continue during travel outside the United States.

To request approval, notify CIES of your international travel plans and the relevance to your research or lecturing and provide a letter in support of your plans from your faculty associate. CIES will forward your request to the U.S. Department of State and will advise you if it is approved.

If you do not have such approval, your coverage will end the day you leave the United States and will be reinstated when you return. Since the ASPE is designed to cover you outside of your home country, insurance will be discontinued for any time that you are in your home country, even if that travel was included in your initial grant.

Appendix F lists a number of insurance providers who offer short-term insurance coverage, which can be used while you are outside the United States.

Adjustment in Stipends

If CIES pays your grant, your stipend amount may need to be adjusted depending on the number of days you are outside the United States. If the total number of days of all trips outside the United States within your grant period exceeds 15, then your stipend will be reduced according to the “Stipend Adjustments” chart. If your grant is not paid by CIES, please check with the Fulbright organization in your home country to determine if stipend adjustments are required. In some cases, it may be possible to add the time spent outside the United States onto the end of your grant period. Your CIES contact person, the Fulbright organization in your country and your host institution must approve such an arrangement in advance.

25. Tax Matters

U.S. Income Tax

Stipend Adjustments	
Number of days outside the United States	Amount of stipend reduction
1-15	None
16-30	½ month
31-45	1 month

This section applies to scholars who will receive income from a U.S. source, including CIES, during their stay in the United States. In general, CIES sends all the necessary tax forms to the scholars it pays.

If you receive income from some other U.S. source, such as your host university, you should obtain information about your tax obligations from that source.

You must pay income tax to the U.S. government on the income you receive from U.S. sources unless you are *exempt* (excused) under a tax treaty or special rulings of the Internal Revenue Service (IRS). Income generally includes stipend payments and allowances, travel costs, honoraria for lecturing (see Section 23), and any other special payments. *U.S. source income* refers to funds provided to you by any institution, organization or organization of the United States, whether these funds were disbursed in the United States or not.

Ultimately, compliance with tax laws and regulations is your responsibility. Keeping good financial records all year long will make completing and filing your tax return easier. For copies of tax forms or more information about U.S. income tax, speak to a representative at the IRS office nearest your host institution.

To locate your local IRS office, consult the IRS Web site at <http://www.irs.gov/localcontacts/index.html> or call 1.800.829.3676.

Withholding

To ensure that taxes are paid on your income, the U.S. government requires CIES to *withhold*—or deduct—a percentage of your income (generally 14 percent) for U.S. income tax. The portion of your income that is withheld is called *withholding*. CIES sends the withheld funds to the IRS, which credits your tax account.

You must *file a tax return* (submit a special tax form) with the IRS for every calendar year in which you receive income from a U.S. source. If you receive income from any U.S. source other than CIES, you are also subject to withholding by that source.

By March 15, CIES mails you Form 1042S (Foreign Person's U.S. Income Subject to Withholding) if you received funding through CIES. If you have completed your Fulbright grant and have already left the United States, it will be mailed to you in care of the Fulbright organization in your home country. This form shows

you the amount of withholding CIES has paid to the IRS on your behalf for the previous calendar year.

You may owe more or less tax than the amount CIES withheld from your stipend payments. If you owe less, you will receive a refund from the IRS about eight to 10 weeks after filing your tax return. If you owe more, you must write a check to the U.S. Treasury and submit it with your tax return.

Tax-Treaty Status

Current tax treaties between the United States and other countries may exempt some Fulbright Scholars from withholding and payment of U.S. income tax, though they must still file income tax returns. The provisions of these treaties vary and exemptions are not automatic. If you are a citizen of a tax-treaty country, however, you may be exempt from withholding of U.S. income taxes while you are temporarily in the United States if you meet the tax-treaty qualifications.

If the United States has a tax treaty with your country, CIES will include a copy of the pertinent sections of the treaty with your arrival packet. You can also see copies of these treaties in most IRS offices and in many public libraries in the United States. General information on each treaty is included in IRS Publication 519 (U.S. Tax Guide for Aliens) and Publication 901 (U.S. Tax Treaties), which you can download from the IRS Web site at <http://www.irs.gov>.

If your treaty states that the lecturing or research you are doing must be at an accredited institution of higher learning, no other type of institution will qualify.

The IRS makes the final decision on whether your country's tax treaty exempts you from U.S. tax. If you are exempt and you receive grant payments from your host institution, consult with institution officials, not CIES, regarding your tax-exempt status.

If your country's tax treaty exempts you from paying U.S. taxes, you must complete a W-8BEN (see Section 14). If you receive funds from CIES, a W-8BEN will be sent to you upon arrival in the United States. Please submit this form to CIES as soon as possible after you receive your SSN or ITIN.

When CIES knows that a particular scholar does have a treaty exemption, it does not withhold tax from the

scholars's first stipend payment. ***However, if a W-8BEN is not on file at the time of the second stipend payment, CIES will withhold tax from the second payment and will also withhold funds retroactively (i.e. take out an additional amount for withholding to cover the first payment). CIES will continue withholding until it receives a W-8BEN.***

You may not claim the benefit of tax exemption under an income tax treaty if you do not have either an SSN or an ITIN.

Filing a Tax Return

If you receive funds from a U.S. source (even if you are exempted by a tax treaty) you must file a U.S. tax return. Federal law requires that your SSN or ITIN appear on your tax return. It is very important that you write your name on your tax return exactly as it appears on your SSN or ITIN card.

In March, following a calendar year in which you received grant funds, CIES will mail you the following forms:

- Form 1042S (Foreign Person's U.S. Source Income Subject to Withholding), reporting the income you received from the grant during the prior calendar year. CIES will also report this information to the IRS. (For example, in March 2006, CIES will mail you a 1042S covering income you received in 2005.)
- Form 1040NR (U.S. Nonresident Alien Income Tax Return Form) or Form 1040NR-EZ (U.S. Income Tax Return for Certain Nonresident Aliens with no Dependents) and instructions.

Because income tax regulations are complex and change frequently, CIES is not permitted to give tax advice. If you have specific questions about your tax return after you have received the packet of information that contains relevant IRS publications:

- contact the local IRS office listed in the telephone directory or
- telephone the IRS Taxpayer Services Office in Philadelphia at 215.516.2000 (not toll free).

All organizations that issue grants are responsible for providing tax documentation to grantees and for reporting grantees' grant income to the IRS. If you are

receiving funds from any organization other than CIES, contact that organization for tax information.

You may find that some of your expenses in the United States are tax deductible as business expenses under U.S. income tax regulations. To find out more about tax-deductible business expenses, see Form 2106 (Employee Business Expenses). You can obtain this form by calling the IRS at 1.800.829.3676 within the United States. IRS forms and publications are also available online at <http://www.irs.gov/formspubs/index.html>.

State Income Tax

Most of the individual states of the United States also tax the income of their residents. If you receive income from a U.S. source, ask your host institution about your state income tax obligations and obtain detailed information from the state tax office nearest your host institution.

Laws differ from state to state, and state laws do not necessarily follow the *federal* (U.S. government) laws. Many states (since they do not have treaties with foreign countries) will tax your income even though it is exempt from federal taxation.

After you determine your state income tax liability, consult a tax advisor or your nearest state tax office to determine how to handle any state tax obligations.

Social Security Tax

Social Security is the U.S. national retirement plan. A portion of every American wage earner's paycheck is automatically deducted for Social Security tax. However, Fulbright stipends or other U.S. Department of State-approved stipends that you receive from a university are not subject to Social Security tax. If you receive a stipend from a university and Social Security tax is withheld (identified as FICA on paycheck stubs) you should bring the mistake to the attention of university officials.

The wages of J-2 visa holders (see Section 11) are usually subject to Social Security tax.

26. Fulbright Foreign Scholarship Board (FSB) Grant Termination Policy

Grounds for revocation or termination of awards include, but are not limited to:

1. Violation of the laws of the United States or the home country
2. Actions clearly contrary to the spirit of mutual understanding
3. Failure to observe satisfactory academic or professional standards
4. Physical or mental incapacitation
5. Engaging in unauthorized income-producing activities
6. Failure to comply with the terms and conditions of the grant
7. Material misrepresentation made by the grantee in a grant application or grant document

8. Conduct which may have the effect of bringing the U.S. Department of State or the Fulbright Program into disrepute.

9. Violation of the policies of the J. Willism Fulbright Foreign Scholarship Board.

The FSB also has authority to terminate a grant on either of the following grounds:

1. the grantee has exhausted all benefits of accident and sickness insurance provided to the grantee by the Department of State in connection with the grant; or
2. the grantee requires such protracted medical treatment that successful completion of the grant is jeopardized.

The procedure for termination shall be made by the U.S. Department of State (not a host institution, Fulbright Commission, U.S. Embassy or cooperating organization). In the event any such ground occurs during the period of a grant, it is FSB policy that such grant should not be renewed or extended.

Part V: At the End of Your Grant Period

27. Return Travel

As part of your grant benefits, the Fulbright organization in your home country will either arrange your international travel or tell you how to arrange it. ***You will be responsible for making any required changes in your return travel, and if necessary, paying for charges related to changing your ticket.*** If your grant period is extended, please make sure that you can change your ticket without penalties. Be sure to confirm your travel arrangements well in advance of your departure. You can call the airline's toll-free number (look for a 1-800 number in the yellow pages of the telephone directory), call a local travel organization or contact the Fulbright organization in your home country.

Round-trip tickets are typically only valid for up to one year from the date of issue. If you have a round-trip ticket and your stay in the United States is extended beyond one year, you must have your ticket *revalidated*, or made valid for the extended period of time. If not, you may have to pay a substantial extra cost or purchase a new ticket. Contact the airline that issued your original ticket to find out if this applies to you. Some scholars have had to mail their tickets to the Fulbright organization in their home country for revalidation. Start early to avoid extra expense or delay.

CIES cannot assist with any changes in return travel. You are responsible for checking if any transit visas are needed for your return travel and for obtaining any required visas.

28. Early Departures

Notify CIES immediately if you have to return to your home country before completion of your grant. If you leave the United States more than 15 days before your grant period expires, you must return any excess funds. If your grant was prepared by CIES, make your check payable to the Institute of International Education (IIE), the organization of which CIES is a division. The chart "Adjustments in Stipends for Early Departure" illustrates the approximate amount you will owe.

Consult with your CIES contact person to determine the exact amount.

If your grant was issued by the Fulbright organization in your home country, contact them to find out how to reimburse them.

Adjustments in Stipends for Early Departure

Number of days before grant end date CIES	Amount of stipend owed
1-15	None
16-30	½ month
31-45	1 month
46-60	1 ½ months
61-75	2 months
76-90	2 ½ months

29. Extensions and Transfers

It is important to keep in mind that the spirit of the Fulbright Program is to increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange. ***When you have completed your grant, you are expected to return home to share the knowledge you have gained.*** This is the reason for the two-year, home-country residence requirement for Fulbright Scholars (see "Visa Limitations on Reentering the United States" in Section 32).

In special cases, extensions of grant length or transfers from Fulbright sponsorship will be considered. In all cases, CIES is governed by the policies of the J. William Fulbright Foreign Scholarship Board, the U.S. Department of State, the Fulbright organization in your home country and the policies of your home government. You must follow these policies and procedures in order to extend your grant period and continue the benefits associated with your Fulbright grant or to transfer your sponsorship to your host institution.

Extensions

In special cases, one grant extension may be possible when a scholar has been unable to complete the grant project during the period of time originally allocated or when an exceptional opportunity arises. These extensions are not automatic. Extensions require approval by the U.S. Department of State, the Fulbright organization in your home country and your home and host institutions—even in cases when extensions are funded by outside sources. Funds for extensions of Fulbright stipends are not usually available; consult your CIES contact person before requesting funding.

Please consider the following guidelines before applying for an extension:

- Extensions of Fulbright sponsorship will be granted only for exceptional causes.
- Only one extension per grant program may be requested.
- The total program length, including an extension, may not exceed 12 months.

Transfers

It is only possible to transfer your J-1 visa sponsorship from the Fulbright Program to another J-1 program. In addition, this is only possible if you have been offered an extraordinary opportunity for follow-up research or teaching that promotes the general goals of the Fulbright Program. Transfers must be fully funded by non-Fulbright sources (e.g., U.S. host institution, sufficient personal funds or another grant source). Transfers require approval by the U.S. Department of State.

A transfer from the Fulbright Program results in the loss of program-related medical insurance and participation in Fulbright professional enrichment programs. In the event the transfer is made before you have used your return ticket that was purchased for your Fulbright grant, the transfer may result in the loss of your return travel benefit. Consult the Fulbright organization in your home country to inquire about return travel benefits.

Procedure for Extension or Transfer Requests

If your circumstances meet the requirements for extension or transfer, you must submit the following documents to CIES at least **one month** prior to the end date of your current program:

- ☐ A letter from you formally requesting an extension or transfer and specifying the exact length of the extension or transfer, with starting and ending dates. You will need to explain specifically why the extension or transfer is needed.
- ☐ A letter from your faculty associate supporting your request.
- ☐ Confirmation from your home institution that you have been given leave for the period requested.
- ☐ Confirmation of funding.
 - Please provide either a letter from a funding source (specifying the amount of support) or a bank statement (if you are planning to use personal funds). The U.S. Department of State recommends that you have at least \$1,500 per month for the period requested, in some cases more, depending on your individual circumstances.
 - If you have no alternate source of funding and intend to request funding from the U.S. Department of State through CIES, please specify in your request letter that you are applying for funding based on your current stipend rate.
- ☐ Written agreement to obtain accident and sickness insurance for any accompanying dependents (Appendix H). For transfers, you will need to obtain insurance for yourself, as well.
- ☐ Written permission from the Fulbright organization in your home country.
- ☐ For transfers, a letter from the institution stating its willingness to transfer sponsorship of your J-1 program. The letter should indicate the date they recommend the transfer to take effect.

If your request meets the requirements and your documentation is complete, CIES will submit your request to the U.S. Department of State and inform you of their decision. This entire process can take up to four weeks. Beginning activities of your proposed extension or transfer is contingent upon approval from the U.S. Department of State.

Note: If you obtain an extension or a transfer:

- It is your responsibility to make sure your international ticket will still be valid on your new departure date.
- If you are from a tax-treaty country and you remain in the United States beyond two years, your tax-exempt status may be affected.

30. Final Report

You are required to complete a final report form during the final weeks of your grant period before returning to your home country.

The Visiting Scholar Final Report is only accessible on the CIES Web site. When you are ready to complete your final report, go to the CIES Web page <http://ww2.cies.org/cies/vfinal/default.cfm>. In order to access the report form, you will need to enter your last name as it appears on your DS-2019 and your scholar ID number (the last six digits of the number on your insurance card).

The final report form includes a number of questions about your program that require you to select a response from a list of choices (either “yes”/“no” or a scale from 1-5). You must complete the entire form, including the section at the end of the report, entitled “Your Story”. This section allows you to write about your experiences. You do not need to complete the final report all at once. You can save your information and log on again at any time to edit your final report. However, once you submit your final report, you can no longer make changes to it.

Your report will be used to evaluate and improve the Fulbright Program and to assist future scholars. CIES will send a copy of the report to the U.S. Department of State and to the Fulbright organization in your home country. Your final report is also important because it allows CIES to take note of your professional and personal accomplishments in the United States. CIES may wish to use interesting information from your final report to include in Fulbright newsletters, association journals, the CIES annual report and on the Web. The details you provide in the narrative section will allow others to better understand how Fulbright Visiting Scholars help the Fulbright Program carry out its goals each year. For examples of how this information has been used in the past, visit the “Fulbright Scholar Stories” section on the CIES Web site.

31. Certificate of Participation

After completing your grant satisfactorily and submitting your final report, the Fulbright organization in your home country will send a certificate of participation to you within six to 12 months. If your current mailing address changes, notify the Fulbright organization in your home country.

32. Immigration Regulations

Grace Period

When you have completed your J Exchange Visitor program, U.S. Citizenship and Immigration Services (USCIS) allows you and your dependents to legally remain in the United States for a maximum of 30 days past the end date that appears in Section 3 of your DS-2019 (see Section 7).

This 30-day period is commonly referred to as the *grace period*. During this 30-day grace period, participants are no longer in J-visa status. This period allows you to settle your affairs and to prepare to return to your home country. You may no longer continue grant activities, nor may you work during this time.

Likewise, insurance and other grant benefits expire at the end of your grant period despite the 30-day grace period. Although you may travel in the United States during the grace period, you cannot travel beyond the borders of the United States as you will not be permitted to reenter using your DS-2019.

If you stay in the United States beyond the grace period, you will be subject to serious consequences.

The Illegal Immigration Reform and Immigrant Responsibility Act of 1996 enumerates penalties for visitors (including J-1 and J-2 visa holders) who stay in the United States longer than they are allowed. The visa stamp (single or multiple entry) in your passport will become invalid if you overstay the authorized period by even one day, regardless of the expiration date on your visa. Visitors who violate this provision must return to their home countries to apply for new visas every time they wish to reenter the United States. In addition, visitors who overstay by 180 days to one year will not be allowed to return to the United States

for three years. Visitors who overstay by one year or more will not be allowed to return for 10 years.

Visa Limitations on Reentering the United States

The Two-Year Rule: You and your J-2 dependents are subject to the two-year, home-country residence requirement (also known as the “two-year rule”) associated with the J visa. This means that until you have resided and been physically present in your home country for at least two years following your departure from the United States, you and your dependents are ineligible to apply for status in the United States as

- permanent residents,
- temporary worker/trainees (visa status H) or
- intracompany transferees (visa status L).

Grounds for applying for a waiver of the two-year, home-country residency requirements are extremely limited and approval of waiver requests are rare. CIES cannot assist in this process. Waivers should not be submitted/requested as a means of continuing your grant activities. If you are interested in continuing your grant activities, see the section on extensions and transfers (Section 29).

The Twelve-Month Bar: U.S. government regulations may limit your reentry as a J-1 researcher or professor. Scholars and their accompanying dependents who have held J status and been physically present in the United States for six months or more are not eligible to apply for reentry as J-1 researchers or professors for 12 months following departure from the United States. *If you have an opportunity for additional research or lecturing beginning immediately after your Fulbright grant and you return to your home country before beginning these activities, you may have to wait a year to return.* However, it may be possible to transfer your sponsorship (see Section 29) as a means of continuing these activities.

33. Insurance Coverage After the Grant Period

The ASPE insurance expires at the end of your grant period. If you have permission to remain in the United States after your grant period has expired, you and your dependents must purchase your own insurance coverage from any company of your choice (see Appendix F). For more information on your medical insurance requirements, see Section 13.

34. Fulbright Alumni

There are a number of ways in which your interaction with the Fulbright Program can continue when you return to your home country. As a returned Fulbright Scholar, you are an important resource for other academics and professionals who may want to learn about your experiences in research and/or lecturing abroad.

Many of your colleagues in your home country may not be aware of the kinds of opportunities that Fulbright offers and they may enjoy learning directly from you about the benefits and challenges of your experience in the United States. Likewise, your U.S. colleagues may be interested in applying to be U.S. Fulbright Scholars to your country or to another area and you may be able to encourage them.

In addition, you may find an organized Fulbright alumni association in your country that can provide further opportunities to share your experiences. A list of Fulbright alumni organizations around the world can be obtained from the U.S. Fulbright Association Web page: <http://www.fulbright.org/associations.htm>.

In some countries, Fulbright alumni are included in larger alumni associations of individuals who have studied in or received grants to the United States. To find out about these alumni activities, contact the Fulbright organization in your country to see how you can be involved in joining or forming an alumni association.

35. Alumni Initiatives Awards

The U.S. Department of State and CIES have established a program of small institutional grants known as the Alumni Initiatives Awards (AIA). Now in its fifth year, the program provides Fulbright Senior Scholar alumni, both U.S. and Visiting Scholars, the opportunity to develop and sustain ongoing contacts and partnerships initiated as a result of their Fulbright experiences abroad. The objective of the AIA is to help transform the individual Fulbright experience into long-term institutional impact. To this end, the program provides small institutional grants to Fulbright alumni to develop innovative projects that will foster institutionally supported linkages and sustainable, mutually beneficial relationships between the Fulbright Scholar's home and host institutions.

The AIA competition is open to proposals submitted jointly by U.S. or Visiting Scholar Fulbright alumni and their host institution partners. Although either U.S. or Visiting Scholar alumni may initiate the application process, all awards are administered through the U.S. institution.

Awards

Up to 30 awards ranging from \$1,000 to \$25,000 are made annually, depending on availability of

funding. Awardees have up to two years to complete their projects and expend AIA funds.

Projects

Proposals should focus on one main activity that fulfills the objectives of the AIA program. Examples include, but are not limited to: Development of joint curriculum, joint distance-learning courses, or joint academic programs; summer seminars or institutes for students, faculty, or administrators; faculty/administrator development, student/faculty/administrative exchanges, etc.

Proposals must demonstrate evidence of commitment on the part of both home and host institutions to support the proposed project and the institutional linkage after the initial AIA funding period has ended.

In the long term, the sustainability of the proposed activity and its demonstrated ability to develop cooperation and institutional capacity are the principal criteria for selection.

Program eligibility and award guidelines change annually. You can find the most current program details and application guidelines on the CIES Web site at <http://www.cies.org/aia>.

Appendix A

Sample Form DS-2019



U.S. Department of State

CERTIFICATE OF ELIGIBILITY FOR EXCHANGE VISITOR(J-1) STATUS

GMB APPROVAL NO.1495-0119
EXPIRES: 02-28-2005
ESTIMATED BURDEN TIME: 45 min
*See Page 2

1. Family Name: El-Khayat		First Name: Ghassan		Middle Name: Hamadeh		Gender: MALE	
Date of Birth (mm-dd-yyyy): 02-12-1945		City of Birth: Hama		Country of Birth: SYRIA		Citizenship Country Code: SY	
Legal Permanent Residence Country Code: SY		Legal Permanent Residence Country: SYRIA		Position Code: 213		Position: UNIVERSITY TEACHING STAFF INCLUDING RESEARCHERS	
U.S. Address: Department of Cereal Science Room 322 IACC Fargo, ND 58105							
2. Program Sponsor: U.S. Department of State (ECA/A/E)						Exchange Visitor Program Number: G-1-00005	
Participating Program Official Description: PROFESSOR; RESEARCH SCHOLAR							
Purpose of this form: Begin new program; accompanied by number (0) of immediate family members.							
3. Form Covers Period: From (mm-dd-yyyy): 05-01-2003 To (mm-dd-yyyy): 08-01-2003				4. Exchange Visitor Category: RESEARCH SCHOLAR Subject/Field Code: 01.1102 Subject/Field Code Description: Agronomy and Crop Science			
5. During the period covered by this form, the total estimated financial support (in U.S. \$) is to be provided to the exchange visitor by: Current Program Sponsor funds : \$8,750.00 Total : \$8,750.00							
6. U.S. DEPARTMENT OF STATE USE OR CERTIFICATION BY RESPONSIBLE OFFICER: THIS FORM HAS BEEN PROVIDED TO THE U.S. DEPARTMENT OF STATE (INCLUDE DATE).				7. Lau: Per:			
				Name of Official Preparing Form Office of Academic Exchange Programs (E) 301 4th Street, SW, Room 234 Washington, DC 20547 Signature of Responsible Officer or Alternate Responsible Officer			
				ernate Responsible Officer Title 202-686-4017 Telephone Number 03-07-2003 Date (mm-dd-yyyy)			
8. Statement of Responsible Officer for Releasing Sponsor (FOR TRANSFER OF PROGRAM) Effective date (mm-dd-yyyy): _____, Transfer of this exchange visitor from program number _____ sponsored by _____ to the program specified in item 2 is necessary or highly desirable and is in conformity with the objectives of the Mutual Educational and Cultural Exchange Act of 1961, as amended. Signature of Responsible Officer or Alternate Responsible Officer _____ Date (mm-dd-yyyy) of Signature _____							
PRELIMINARY ENDORSEMENT OF CONSULAR OR IMMIGRATION OFFICER REGARDING SECTION 212(e) OF THE IMMIGRATION AND NATIONALITY ACT AND PL 94-484, AS AMENDED (see item 1(a) of page 2). The Exchange Visitor in the above program: 1. <input type="checkbox"/> Not subject to the two-year residence requirement. 2. <input type="checkbox"/> Subject to two-year residence requirement based on: A. <input type="checkbox"/> Government financing and/or B. <input type="checkbox"/> The Exchange Visitor Skills List and/or C. <input type="checkbox"/> PL 94-484 as amended Name _____ Title _____ Signature of Consular or Immigration Officer _____ Date (mm-dd-yyyy) _____ THE U. S. DEPARTMENT OF STATE RESERVES THE RIGHT TO MAKE FINAL DETERMINATION REGARDING 212 (e).						TRAVEL VALIDATION BY RESPONSIBLE OFFICER (Maximum validation period is one year*) *EXCEPT: Maximum validation period is up to six months for Short-term Scholars and four months for Camp Counselors and Summer Travel/Work. (1) Exchange Visitor is in good standing at the present time Date (mm-dd-yyyy) _____ Signature of Responsible Officer or Alternate Responsible Officer _____ (2) Exchange Visitor is in good standing at the present time Date (mm-dd-yyyy) _____ Signature of Responsible Officer or Alternate Responsible Officer _____	
EXCHANGE VISITOR CERTIFICATION: I have read and agree with the statement on item 2 on page 2 of this document. Signature of Applicant _____ Place _____ Date (mm-dd-yyyy) _____							

Read this page and sign the Exchange Visitor Certification block on the bottom of page1 and prior to presentation to a United States Consular or Immigration Official.

(a) TWO-YEAR HOME-COUNTRY PHYSICAL PRESENCE REQUIREMENT (SECTION 212(e) OF THE IMMIGRATION AND NATIONALITY ACT AND PL 94-484, AS AMENDED):

RULE: Exchange visitors whose programs are financed in whole or in part, directly or indirectly by either their government or by the U.S. Government, are required to reside in their home-country for two years following completion of their program before they are eligible for immigrant status, temporary worker (H) status, or intracompany transferee (L) status. Likewise, if exchange visitors are acquiring a skill which is in short supply in their home country (*these skills appear on the "Exchange Visitor Skills List"*), they will be subject to the same two-year home-country residence requirement. The requirement also is applicable to alien physicians entering the United States to receive graduate medical education or training. The U.S. Department of State reserves the right to make the final determination regarding 212(e).

NOTE: MARRIAGE TO A U.S. CITIZEN OR LEGAL PERMANENT RESIDENT, OR BIRTH OF A CHILD IN THE UNITED STATES DOES NOT REMOVE THIS REQUIREMENT.

(b) Extension of Stay/Program Transfers: A completed Form DS-2019 is required in order to apply for a program extension or program transfer, and must be obtained from or with the assistance of the sponsor.

(c) **Limitation of Stay: STUDENTS** - as long as they pursue a full course of study towards a degree, or if engaged full-time in a non-degree program, up to 24 months. Students for whom the sponsor recommends academic training may be permitted to remain for an additional period of up to 18 months after receiving their degree or certificate; post-doctoral academic training may be approved by the sponsor for a period not to exceed 36 months; **SECONDARY STUDENTS** - up to 1 academic year; **TRAINEES** - 18 months; **FLEET TRAINEES** - 24 months; **TEACHERS, PROFESSORS, and RESEARCH SCHOLARS** - 3 years; **SHORT-TERM SCHOLARS** - 6 months; **SPECIALISTS** - 1 year; **INTERNATIONAL VISITORS** - 1 year; **ALIEN PHYSICIAN** - the time typically required to complete the medical specialty involved but limited to 7 years with the possibility of extension if approved by the U.S. Department of State; **GOVERNMENT VISITOR** - up to 18 months; **CAMP COUNSELOR**-up to 4 months; **SUMMER TRAVEL/WORK**-up to 4 months; **AU PAIR** - 1 year; **INTERN** - up to 12 months.

[illegible]

(e) **Cancellation of Visa.** If the visa of an exchange visitor (and dependent(s)) are subject to cancellation, the exchange visitor must leave the United States upon completion of their term in the United States and may not re-enter the United States for any other nonimmigrant category except, if the exchange visitor is a dependent of either of these types of officials or

(f) **Insurance:** Exchange visitors are required to have medical insurance in effect for themselves and any accompanying spouse and minor children on J visas for the duration of their exchange program. At a minimum, insurance coverage shall include: (1) medical benefits of at least U.S. \$50,000 per person per accident or illness; (2) repatriation or remains in the amount of U.S. \$7,500; and (3) expenses associated with medical evacuation in the amount of U.S. \$10,000. A policy secured to fulfill the insurance requirements shall not have a deductible that exceeds U.S. \$500 per accident or illness, and must meet other standards specified in the Exchange Visitor Program regulations, 22 CFR Part 62.14. For details, consult your program's Responsible Officer (*see item 7 on page 1 of this form*).

2. **EXCHANGE VISITOR CERTIFICATION:** I have read and understand the foregoing, including the Two-Year Home-Country Physical Presence Requirement, and agree to comply with the Exchange Visitor Program regulations, as amended (22 CFR Part 62). I certify that all the information on the Form DS-2019 is true and correct to the best of my knowledge. I agree that I will maintain compliance with the insurance regulations as specified in 22 CFR 62.14, including maintaining health insurance coverage for myself and my J-2 dependents throughout my J-1 program. **I understand that it is my responsibility to maintain my exchange visitor status.** For the purposes of 20 U.S.C. 1232g and 22 CFR 62, I authorize the U.S. Department of State-designated sponsor and any educational institution named on the Form DS-2019 to release information to the U.S. Department of State relating to compliance with Exchange Visitor Program regulations.

To facilitate your readmission to the United States after a visit in another country other than a contiguous territory or adjacent islands, you should have the Responsible Officer of your sponsoring organization indicate on the TRAVEL VALIDATION BY RESPONSIBLE OFFICER or Alternate Responsible Officer section of the Form DS-2019 that you continue to be in good standing.

The signature of the Responsible Officer or the Alternate Responsible Officer on the Form DS-2019 is valid for up to one year* or until the end date in item 3 on page 1 of this Form, or to the validation date authorized by the Responsible Officer, whichever occurs sooner.

***EXCEPT:** Maximum validation period is up to six months for Short-term Scholars and four months for Camp Counselors and Summer Travel/Work

* Under the Mutual Educational and Cultural Exchange Act of 1961, as amended, the U.S. Department of State has been delegated the authority to designate Exchange Visitor Programs for U.S. Government agencies, and for public and private educational and cultural exchange organizations. The information is used by Exchange Visitor Program sponsors to appropriately identify an individual seeking to enter the United States as an exchange visitor. The completed form is sent to the prospective exchange visitor abroad, who takes it to the U.S. Consulate (*Embassy*) to secure an exchange visitor (*J-1, J-2*) visa. Responses are mandatory. An Agency or organization may not conduct or sponsor, and the respondent is not required to respond to a collection of information unless it displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 45 minutes per response, including the time for reviewing instructions, researching existing data sources, gathering and maintaining the data needed, completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: U.S. Department of State, A/RPS/DIR, Washington, D.C. 20520.

Appendix B

Summary of U.S. Customs Regulations

The following information is excerpted from the U.S. Customs & Border Protection's Web site. For the most up-to-date customs information, please refer to <http://www.cbp.gov>.

- *Alcohol and tobacco.* Each traveler over 21 years of age may import up to one liter of alcoholic beverages and either 200 cigarettes or 50 cigars or 2 kilograms of smoking tobacco for personal use.
- *Gifts.* Each traveler may bring in gift items up to a total value of U.S. \$100. Gifts may not include alcoholic beverages, perfumes containing alcohol and valued at more than U.S. \$5 retail, or cigarettes, but they may include up to 100 cigars in addition to the personal allowance of tobacco.
- *Narcotics, meats, fruits, vegetables and plants.* None of these items may be imported without an import permit. If you depend on medicines that contain habit-forming drugs, you should declare them at customs upon arrival. They should be in their original containers and, if possible, should include a prescription or a letter from your physician describing their use.
- *Personal effects.* You may bring any reasonable amount of personal effects (clothing, toiletries, jewelry), as well as equipment such as sporting goods, cameras, radios, typewriters, bicycles and cars, provided they are for your own use and you do not intend to sell them in the United States.
- *Bringing your personal computer to the United States.* If you bring your personal computer with you, you should declare it upon arrival in the United States as part of your personal effects. To do this, you should complete the disembarkment card provided by the airlines before landing. If you have the sales receipt, you may want to bring it with you.
- *Computers purchased in the United States.* If you purchased a computer for more than \$2,500, you will need to complete a Shippers Export Declaration form before leaving the United States. You can obtain this form from your airline. If you purchased a computer for less than \$2,500, you will not need to complete this form.
- *Currency.* There are no restrictions on the import of U.S. or foreign currency, but you must file a report with the U.S. Customs Service if you wish to bring more than U.S. \$10,000 into the United States.

Appendix C

Arriving at a U.S. Port of Entry...What an Exchange Visitor Can Expect

U.S. Immigration and Customs Enforcement's **Student and Exchange Visitor Program (SEVP)** is committed to facilitating your stay in the United States while you take advantage of our nation's academic, educational, and cultural offerings. To enhance security without slowing legitimate travel, the U.S. Department of Homeland Security (DHS) has instituted some changes in U.S. entry and exit procedures. Careful planning and preparation by international students can ensure that any delay based on these procedures is minimal.

PLAN YOUR ARRIVAL

Exchange Visitors are prohibited from entering the United States more than 30 days in advance of the program start date identified in Item 3 of Form DS-2019.

ALWAYS HAND CARRY YOUR DOCUMENTS

Do not put the following documents in your checked baggage. If your baggage is lost or delayed, you will be unable to present the documents at your port of entry. As a result, you may not be able to enter the United States.

1. **Your passport, valid for at least six months beyond the date of your expected stay.**
2. **The sealed envelope given to you by the Consular Officer if this is your initial entry into the United States.** When you receive your nonimmigrant visa at a U.S. Embassy or Consulate, the consular officer will seal your immigration documents (DS-2019) in an envelope and attach it to your passport. You should not open this envelope! The Customs and Border Protection (CBP) Officer at the U.S. Port of Entry will open the envelope.
3. **The DS-2019, if re-entering the United States**

In addition, it is strongly recommended that you also hand carry the following documentation:

1. Evidence of financial resources;
2. Letter of acceptance as a participant in the Exchange Visitor Program;
3. Name and contact information for your sponsoring organization.

For greater detail on procedures for traveling and arriving in the United States, visit:

<http://educationusa.state.gov/predeparture/travel/customs.htm>

COMPLETE YOUR ENTRY PAPERWORK

If Arriving By Air: Flight attendants will distribute Customs Declaration Forms (CF-6059) and Arrival-Departure Record Forms (I-94). These must be completed prior to landing.

If Arriving By Land or Sea: The CBP Officer at the port of entry will provide the necessary Customs Declaration Forms (CF-6059) and Arrival-Departure Record Forms (I-94) to be filled out upon your arrival.

AS YOU ARRIVE AT THE PORT OF ENTRY

Proceed to the terminal area for arriving passengers. Have the following documents available for presentation: your passport; the sealed envelope that contains your DS-2019; Arrival-Departure Record Form (I-94); and Customs Declaration Form (CF-6059). The Form I-94 should reflect the address where you will reside, not the address of the program.

All visitors entering the United States must state their reason for wishing to enter the country. You will also be asked to provide information about your final destination. **It is important that you tell the CBP Officer that you will be an exchange visitor.** Be prepared to include the name and address of the institution where you will engage in your grant activities.

Once your inspection is successfully completed, the inspecting officer will:

- **Stamp your SEVIS Form for duration of status (“D/S”) for J visa holders with date and port of entry**
- **Stamp the Arrival-Departure Record Form (I-94) and staple it in the passport**

FOLLOWING ADMISSION INTO THE UNITED STATES

Exchange Visitors must report to their Exchange Visitor Program sponsor within 30 days of the program begin date identified in line 3 of the DS-2019 to have their participation in the program activity validated. Exchange Visitors in programs beginning with “G” listed in item 2 of the DS-2019, and who are being sponsored for less than 30 days, must have their sponsor validate their participation prior to the end date listed in Item 3 of the DS-2019. Failure to have participation validated will result in an automatic invalidated SEVIS record.

ADDITIONAL INFORMATION

Secondary Inspection Requirements

If the CBP officer at the port of entry cannot initially verify your information or you do not have all of the required documentation, you may be directed to an interview area known as “secondary inspection.”

Secondary inspection allows inspectors to conduct additional research in order to verify information without causing delays for other arriving passengers.

The CBP officer will first attempt to verify your status by using the Student and Exchange and Visitor Information System (SEVIS). In the event that the CBP officer needs to verify your

admission/participation with your sponsor **we strongly recommend** that you have the **name and telephone number of your J-1 Exchange Visitor Program sponsor available**. In the event you arrive during non-business hours (evenings, weekends, holidays), you should also have the emergency phone number.

Failure to comply with U.S. government entry-exit procedures may result in your being denied entry to the United States. Under certain circumstances, the CBP officer may issue a “Notice to Student or

Exchange Visitor” Form (I-515A), which authorizes temporary admission into the United States. Work with your program sponsor to submit proper documentation without delay.

US-VISIT

All nonimmigrant visitors holding visas-regardless of race, national origin, or religion -participate in the US-VISIT, a comprehensive registration tracking system for entries to and exists from the United States. The program involves obtaining a scan of two index fingerprints and a digital photograph.

How do US-VISIT entry procedures work?

US-VISIT is part of a continuum of security measures that begins overseas, when a person applies for a visa to travel to the United States, and continues from their arrival to and departure from the United States. It incorporates eligibility determinations made by both the Departments of Homeland Security and State.

Enrollment in US-VISIT for visitors applying for a visa is done overseas at the visa-issuing post where each visitor has his or her biographic and biometric information – two index fingerscans and a digital photograph – captured by a State Department official.

US-VISIT entry procedures are currently in place at 115 airports, 14 seaports and the 50 busiest land ports of entry.

Upon a visitor’s arrival in the United States, a U.S. Customs and Border Protection Officer uses an inkless digital fingerprint scanner to electronically capture two fingerscans. The visitor is asked to put the left index finger and then the right index finger on the scanner. The U.S. Customs and Border Protection Officer also takes a digital photograph of the visitor.

The biographic and biometric data is used to match the visitor with the travel documents and is compared against watch lists. The U.S. Customs and Border Protection Officer asks questions about the visitor’s stay in the United States. At that point, the U.S. Customs and Border Protection Officer either admits the visitor or conducts additional inquiries based on the verification results. These procedures should

reduce fraud, identity theft, and the risk that terrorists and criminals will enter the United States undetected.

While in the United States, should the visitor seek to adjust status or extend his or her stay, US-VISIT would be updated with any modifications to the individual's status.

For more information:

http://www.dhs.gov/dhspublic/interapp/editorial/editorial_0440.xml

National Security Entry-Exit Registration System (NSEERS)

Some individuals will be asked to provide additional information under the National Security Entry-Exit Registration System, or NSEERS. A packet of information will be available at the port of entry explaining the registration procedure.

For more information:

http://www.dhs.gov/dhspublic/interapp/editorial/editorial_0440.xml.

Travel Outside the United States During Your Program

Exchange Visitors may leave the United States and re-enter at anytime during their program with the proper documentation. Before leaving, exchange visitors must discuss this with their program sponsor to obtain an endorsement from the Responsible Officer (ARO). The endorsement will be made on page 1 of the SEVIS Form DS-2019. When returning to the United States, a continuing exchange visitor must present a valid SEVIS Form DS-2019 with the ARO signature showing that the exchange visitor is active and in good standing with the program.

Information contained within this fact sheet was obtained from the U.S. Immigration and Customs Enforcement (ICE) Web site of the Department of Homeland Security. All information accurate as of December 2004.

Appendix D

Accident and Sickness Program for Exchanges (ASPE): General Information

HEALTH CARE PROVISION

What is a Preferred Provider Organization?

Your health plan includes a preferred provider organization (PPO). A PPO is a network of physicians, hospitals, and clinics who have entered into an agreement with the United States Department of State (DOS) to accept discounted fees for services they provide to DOS participants. Using a PPO provider saves you money because DOS pays 100% of your charges (or up to the policy limit) for covered illness. In most cases, if a provider is participating in the network, your payment will not be required at the time of service (except for the deductible) as the network bills directly to the insurance administrator.

Failure to use an available PPO provider in the network will result in your being responsible for charges over the usual and customary amount if charged by the provider. That means you will be responsible for payment at time of service and any balance billings.

DOS uses the CCN network as the primary network and has arrangements with the MMP Laboratory, Durable Medical Equipment, radiology network and the Up and Up Facility Network.

How do I locate a provider or facility in the network?

You can search the primary network directly from the Web at <http://www.onlinehealthplan.com>. Simply click on the section titled Provider Directory on the Guest Home Page. There is also a network access telephone number on your ID card (1.800.726.0766) that you can call directly to find a network provider in your area. Although there is no provider network for Americans abroad, the local Fulbright Commission, U.S. Embassy, or Consulate can suggest a list of health care providers.

What about a hospital emergency room?

Emergency care is extremely expensive and should only be used in the most critical of circumstances (life threatening situations, broken bones, uncontrollable bleeding, etc.). Use of an emergency room in a non-emergency situation could result in additional charges for which you will be held personally responsible.

What should I take with me to the doctor or pharmacy?

When you seek medical treatment, take your valid ASPE identification card and photo identification (such as a passport or university identification card). If you are seeing a provider outside of the network you should also take a claim form, as payment may be required at the time of service. It is also helpful to bring the ASPE brochure with you to show your provider what treatments are covered under ASPE.

Why should I carry my I.D. card with me?

Some health care providers require proof of insurance before they will provide health care services. Your card is proof of coverage under the ASPE. It contains important provider network logos needed to ensure you are not billed for amounts over usual and customary paid by your insurance. Also, if your medical condition prevents communication, the card gives health care providers valuable information. A valid ASPE identification card may be used only by an eligible participant and must be filled out in its entirety, including complete name of the Covered Person, DOS program/project, name of Program Official, telephone number and dates of coverage. A person who does not meet eligibility requirements, or an individual seeking treatment outside the enrollment period, abrogates the DOS and cooperating organization from any liability associated with loss or claim.

What should I do if I need medical attention that isn't available in my country of assignment? What if my doctor tells me I must go home immediately?

If your health condition requires that you receive medical treatment outside of the United States, inform your staff contact immediately. Detailed

instructions for a medical evacuation can be found on the inside of the back cover of the ASPE brochure.

An electronic version of the ASPE brochure is available online at <http://www.onlinehealthplan.com>. You may also view, download and print the ASPE claim form from the Download Forms section of this Web site.

Appendix E

Limitations on the Benefits of the Accident and Sickness Program for Exchanges (ASPE): General Information

The Bureau's Accident and Sickness Program does not cover the following:

1. Benefits for loss due to a pre-existing condition. A pre-existing condition is any condition which
 - a. existed prior to the Covered Person's effective date of coverage, with or without his/her knowledge;
 - b. a Physician was consulted prior to the Covered Person's effective date of coverage;
 - c. treatment or medication was received prior to the Covered Person's effective date of coverage; or
 - d. would have caused any prudent person to seek medical advice or treatment prior to the Covered Person's effective date of coverage.

Participants are urged to retain or obtain their own insurance to cover ongoing or potential medical requirements relating to pre-existing conditions.

NOTE: For purposes of the ASPE, pregnancy is not defined as a pre-existing condition.

2. Spouse and Dependents. Coverage for accompanying spouse and dependent children may be purchased by the participant with any of the policies listed in Appendix E or any other commercially available policies.
3. Expenses incurred for the treatment of an Injury or Sickness more than one calendar year after the time of the Injury or onset of the Sickness.
4. Expenses incurred within the Covered Person's home country or country of regular domicile, unless:
 - a. it is necessary and authorized treatment received after the individual has proven Sickness or Injury in the country of assignment; or
 - b. it is related to a pre-approved medevac and which would have otherwise been covered had the expenses occurred in the country of assignment.
5. Services or supplies for any Injury or Sickness received prior to the Covered Person's effective date under the ASPE, or which are not actually incurred while this Program is in force.
6. Injury or Sickness sustained or contracted during any period of unofficial travel outside the country of assignment.
7. Expenses covered under any occupational benefit plan, Workers Compensation Act or similar law, automobile medical payment or no-fault plans, public assistance programs, government plan, any other valid and collectible group insurance, or any primary insurance. However, the ASPE will pay medical expenses which are not paid by such primary insurance due to application of deductibles or limitations on benefits, provided that such expenses would otherwise be covered by the provisions of this Program.
8. Expenses in excess of Usual, Customary and Reasonable Charges.
9. Services or supplies which are experimental or investigative in nature; including any treatment, procedure, facility, equipment, drugs, drug usage, devices, or supplies not recognized as accepted medical practice; and any such items requiring federal or other governmental organization approval not received at the time services were rendered.
10. Charges of an institution, health service, or infirmary which does not require payment in the absence of insurance.
11. Professional services rendered by a member of the Covered Person's immediate family or anyone who lives with the Covered Person.

12. Expenses incurred during a hospital emergency room visit which is not of an emergency nature.
NOTE: Emergency nature is defined as that treatment sought under life-threatening circumstances and for a condition that could not be left unattended without causing further injury or complications.
13. Routine physical examinations or health examinations including routine care of a newborn infant. "Routine exams" include vaccinations, immunizations, and any such exam required for registration at a university. The program does not cover maternity medical care before or after the period of assignment.
14. Expenses incurred resulting from the use of alcohol or intoxicants, or any drugs by the Covered Person, unless prescribed by a Physician; expenses incurred due to substance abuse treatment.
15. Treatment to the teeth, gums, jaw, or structures directly supporting the teeth. This exclusion does not apply to the repair of injuries to sound natural or false teeth caused by a covered Injury including surgical extractions of teeth. This exclusion does not apply to treatment for the emergency alleviation of pain, in which case dental treatment shall be limited to \$500. The Administrator may reject any claim for dental treatment when not accompanied by proof of a covered Injury to the participant. Pyorrhea is a disease and is covered as a medical expense.
16. Artificial aids and corrective appliances, such as: external prosthetic devices; orthopedic devices; hearing aids corrective lenses; or, eyeglasses, except as required for repair caused by a covered Injury.
17. Treatment of congenital anomalies and conditions arising or resulting directly therefrom.
18. Expenses incurred for plastic or cosmetic surgery, unless they result directly from a covered Injury which necessitated medical treatment within 24 hours of the accident.
19. Expenses incurred for services related to the diagnostic treatment of infertility or other problems related to inability to conceive a child, unless such infertility is a result of a covered Injury or Sickness.
20. Birth control, including surgical procedures and devices, and elective termination of pregnancy.
21. Deviated nasal septum, including submucous resection and surgical correction thereof.
22. Expenses incurred in connection with weak, strained or flat feet, corns, calluses, or toenails.
23. The diagnosis and treatment of acne.
24. Expenses incurred for chiropractic care, which is defined as out-patient treatment in connection with the detection or correction by mechanical or manual means of structural imbalance, distortion or subluxation on the human body for the purposes of removing nerve interference as a result of or related to distortion, misalignment, or subluxations of or in the vertebrae column.
25. Services and supplies not medically necessary for the diagnosis or treatment of a covered Sickness or Injury or which are not recommended by the attending Physician, including television and telephone access while hospitalized.
26. Loss due to war, declared or undeclared, while in the service in the Armed Forces of any country.
27. Intentionally self-inflicted injury, suicide, or any attempted threat.
28. Losses resulting from Perilous Activity.
29. Expense incurred for taxicabs or other transportation to and from the doctor's office or other place of treatment, except if an approved medical evacuation expense.

Appendix F

Sources of Dependent, Short Term and Supplemental Insurance

You must purchase insurance for all accompanying J-2 dependents, as family members of Fulbright scholars do not receive insurance coverage from the U.S. Department of State. You may also wish to purchase supplemental insurance for yourself.

Below is a list of some companies in the United States with health insurance plans that are offered to you and your dependents. Some plans offer enrollment and payment via the Internet. It is always a good idea to thoroughly compare benefits and prices of at least two plans.

Please note that this list is for informational purposes only, it does not represent any endorsement by the Fulbright Program. Some main points of the coverage they provide are listed (subject to change). To determine if plans are available to meet your needs, contact the insurance provider or check their Web sites.

Associated Insurance Plans International, Inc.

1301 South Wolf Road, Suite 403

Prospect Heights, IL 60070-1783

Tel: 800.452.5772 Fax: 847.537.6958

E-mail: office@AssociatedInsurancePlans.com

Web site: <http://www.a-i-p-i.com>

Atlas America (for 15 days to 5 ½ months)/Atlas Extra (for 6-12 months)

- Coverage for 15 days to 12 months
- Ages 14 days to 80+ years
- \$50,000, \$250,000 or \$500,000 of coverage per incident for up to 5 ½ months
- \$500,000 or \$1,000,000 of coverage per incident for 6 or more months
- Medical evacuation covered to maximum limit
- Repatriation covered to maximum limit
- Deductibles of \$100, \$250, or \$500
- Excludes pre-existing conditions and pregnancy
- Option for home country coverage
- Get quote online

Cultural Insurance Services International

River Plaza

9 West Broad Street Stamford, CT 06902-3788

Tel: 800.303.8120 Fax: 203.399.5596

E-mail: cisiwebadmin@aifs.com

Web site: <http://www.culturalinsurance.com>

- \$200,000 of medical benefits per injury/illness
- Emergency evacuations and repatriation covered to \$50,000
- \$100 deductible
- Excludes pre-existing conditions
- May purchase any period of time in full months. Renewals must be for at least three months.
- Enroll online

Cultural Insurance Services International

River Plaza

9 West Broad Street Stamford, CT 06902-3788

Tel: 800.303.8120 Fax: 203.399.5596

E-mail: cisiwebadmin@aifs.com

Web site: www.culturalinsurance.com

- \$200,000 of medical benefits per injury/illness
- Emergency evacuations and repatriation covered to \$50,000
- \$100 deductible
- Excludes pre-existing conditions
- May purchase any period of time in full months. Renewals must be for at least three months.
- Enroll online

Global Underwriters

3195 Linwood Road, Suite 201

Cincinnati, OH 45208

Tel: 800.423.8496 or 513.533.1500 or 513.533.9800

Fax: 513.533.1055 or 513.533.1504

E-mail: jpennington@globalunderwriters.com

Web site: <http://www.globalunderwriters.com>

Diplomat Longterm

- For coverage outside the United States for three months to one year, renew to 36 months
- Coverage from \$50,000-\$1,000,000
- Deductibles as low as \$100
- Home country coverage
- Travel assistance

Diplomat America

- Coverage from 15 days to 12 months
- Coverage from \$50,000-\$500,000
- Medical evacuation \$100,000
- Repatriation \$20,000
- Deductibles as low as \$100
- Excludes pre-existing conditions, pregnancy

The Gateway Plans

Gateway Plan Administrator

1255 23rd Street, NW Suite 300

Washington, DC 20037

Tel: 202.367.5097 or 800.282.4495

Fax: 202.367.5076

E-mail: gateway@marshpm.com

Web site: <http://www.gatewayplans.com>

Gateway INTERNATIONAL

- Short-term coverage for 15 to 180 days for travel anywhere outside the United States

Gateway USA

- Coverage for 15 days to 18 months
- \$25,000 or \$100,000 coverage
- Medical evacuation \$100,000
- Repatriation \$20,000
- \$100 deductible
- Pre-existing conditions and pregnancy excluded

The Harbour Group

P.O. Box 898

25 East Central Avenue, Suite #4

Springboro, OH 45066

Tel: 937.748.5200 or 800.252.8160

Fax: 937.748.5208

E-mail: info@hginsurance.com

Web site: <http://www.hginsurance.com>

International Student and Scholar Medical Insurance

- \$250,000 of coverage for scholars (for dependent insurance, please contact the company directly)
- Medical evacuation \$50,000
- Repatriation coverage \$50,000
- Deductible \$250
- Covers pregnancy for scholars
- Enroll online

HTH Worldwide

PO Box 39

Minneapolis, MN 55440-6039

Tel: 952.903.6418; 800.242.4178 (toll-free)

Fax: 952.946.7547; 877.865.5981 (toll-free)

E-mail: studentinfo@hthworldwide.com

Web site: <http://www.hthworldwide.com>

Preferred Health Plan or Healthcare Advantage Plan

- \$500,000 or \$250,000 of coverage per incident
- Medical evacuation \$50,000
- Repatriation coverage \$15,000
- Deductible \$100
- Excludes pre-existing conditions
- Covers pregnancy
- Enroll online

International Medical Group, Inc.

407 North Fulton Street Indianapolis, IN 46202

Tel: 800.628.4664 or 317.655.4500

Fax: 317.655.4505

E-mail: insurance@imglobal.com

Web site: <http://www.imglobal.com>

Patriot America

- Coverage for 10 days to 12 months
- Up to \$1,000,000 coverage per incident

- Medical evacuation
- Repatriation \$25,000
- \$100-\$2,500 deductible
- \$25,000 accidental death coverage
- Injury and accident coverage
- Excludes pre-existing conditions
- Worldwide coverage, including home country
- Get a quote/apply online

International Student Organization in America (ISOA)

250 West 49th Street, Suite 806

New York, NY 10019

Tel: 1.800.244.1180

Fax: 212.262.8920

E-mail: mailbox@isoa.org

Web site: <http://www.isoa.org>

VIP

- \$50,000 coverage per incident
- Medical evacuation \$20,000
- Repatriation \$10,000
- \$150 deductible
- Excludes pre-existing conditions and pregnancy
- Age limit: age 49

VIP+

- \$150,000 coverage per incident
- Medical evacuation \$20,000
- Repatriation \$10,000
- \$100 deductible
- Excludes pre-existing conditions and pregnancy
- Age limit: age 49

VIP Elite

- \$250,000 coverage per incident
- Medical evacuation \$20,000
- Repatriation \$10,000
- \$90 deductible
- Excludes pre-existing conditions and pregnancy
- Age limit: age 49

PSA Financial Center

1447 York Road, Suite 400 Lutherville, MD 21093

Tel: 410.821.7766 or 800.677.7887

Fax: 410.828.6242

E-mail: information@psafinancial.com

Web site: <http://www.psafinancial.com>

Global Medical USA

- Coverage from 15 days to 12 months
- Medical Evacuation \$100,000
- Repatriation coverage \$25,000
- Deductibles starting at \$250
- Plans with coverage to \$50,000, \$100,000, \$250,000 and \$500,000
- Excludes pre-existing conditions, pregnancy
- Home Country Coverage included
- Enroll online
- Worldwide assistance network

Specialty Risk International, Inc.

9200 Keystone Crossing Suite 300

Indianapolis, IN 46240

Tel: 317.575.2652 or 800.335.0611

Fax: 317.575.2659

E-mail: info@specialtyrisk.com

Web site: <http://www.specialtyrisk.com>

Liaison International

- Ages 14 days and over eligible
- \$50,000, \$100,000, \$500,000 or \$1,000,000 medical expense benefit per accident/illness
- \$100,000 evacuation benefit
- \$20,000 repatriation benefit
- \$100, \$250, \$500, \$1,000 or \$2,500 deductible
- Purchase 7 days to 12 months
- Enroll online with a credit card

Travel Insurance Services

2950 Camino Diablo, Suite 300

Walnut Creek, CA 94597

Tel: 1.800.937.1387 or 925.932.1387

Fax: 925.932.0442

E-mail: webinfo@travelinsure.com

Web site: <http://www.travelinsure.com>

Study USA-Health Care

- Age limit: 55 and under
- \$200,000 or \$250,000 coverage per incident
- Medical evacuation \$30,000
- Repatriation of remains \$10,000
- Excludes pre-existing conditions and pregnancy

Visit USA-Health Care

- \$50,000 or \$100,000
- Medical evacuation \$50,000 or \$100,000
- Repatriation of remains \$10,000 or \$20,000
- Incidental travel (to Canada, Mexico, U.S. Territories, maximum 14 days) included
- Emergency travelers assistance service included
- Excludes pre-existing conditions and pregnancy

Wallach & Company, Inc.

P.O. Box 480 Middleburg, VA 20118

Tel: 540.687.3166 or 800.237.6615

Fax: 540.687.317

E-mail: info@wallach.com

Web site: <http://www.wallach.com>

Health Care International

- Ages 15 days-70 eligible
- \$1,000,000 per accident/illness, includes medical evacuation and repatriation
- \$100 deductible
- Travelers assistance services
- Excludes pre-existing conditions
- Covers new pregnancy/maternity up to \$25,000 where expected date of birth is at least 10 months after the mother became covered with this policy
- Home county coverage
- Enrollment length minimum: 6 months

Health Care America

- Ages 3 -70 eligible
- \$100,000 per accident/illness, includes medical evacuation and repatriation
- \$100 deductible
- Travelers assistance services
- Excludes pre-existing conditions
- Enrollment length maximum: 90 days

Appendix G

Notification of Arrival Form

Appendix H

Certification of Dependent Medical Insurance for Requested Period of Extension

Please check the appropriate line, and sign your name where requested. Also print your name and address in the lower left-hand corner. Return to your CIES contact person.

(A) _____ If my request for an extension of my Fulbright grant is approved, I certify that I will purchase health insurance for my dependents for the full length of the extended period in the United States. Further, I certify that the health insurance policy purchased for dependents meets the basic requirements:

- (1) major medical benefits of \$50,000,
- (2) repatriation of remains at \$7,500,
- (3) medical evacuation to home country at \$10,000 and
- (4) a deductible not to exceed \$500.

OR

(B) _____ I will not have accompanying dependents during the period of the extension.

Signature of grantee

Date

Print name _____

Address _____

Appendix I

Fulbright Metropolitan Area Enrichment Programs

Boston

Mary Rose Bolton, Coordinator
Fulbright Visiting Scholar Enrichment
Program: Boston Area
11 Gray Gardens West
Cambridge, MA 02138
Tel: 617.495.0361 (office)
Tel: 617.864.4074 (home)
E-mail: mbolton@fas.harvard.edu

Chicago

Peggy Parfenoff, Coordinator
Fulbright Visiting Scholar Enrichment
Program: Chicago Area
International Visitors Center of Chicago
78 East Washington, 2nd floor
Chicago, IL 60602
Tel: 312.254.1800
E-mail: pparfenoff@ivcc.org

Los Angeles

Ann Kerr, Coordinator
Fulbright Visiting Scholar Enrichment
Program: Los Angeles Area
University of California
10266 Bunche Hall
405 Hilgard Avenue
Los Angeles, CA 90024-1487
Tel: 310.825.2009 (UCLA office)
Tel: 310.573.1136 (home office)
E-mail: akerr@isop.ucla.edu

New York City

Tracy Snyder, Coordinator
Cate Conmy, Assistant Coordinator
Metro International
Fulbright Visiting Scholar Enrichment
Program: New York Area
285 West Broadway, Suite 450
New York, NY 10013
Tel: 212.431.1195
E-mail: info@metrointl.org

San Francisco

Marilyn Herand, Coordinator
Fulbright Visiting Scholar Enrichment
Program: San Francisco Area
432 Diamond Street
San Francisco, CA 94114
Tel: 415.648.4092
Fax: 415.648.9091
E-mail: mherand@cs.com

Washington, DC

Jeanine Greene, Coordinator
Fulbright Visiting Scholar Enrichment
Program: Washington Area
University of Maryland at College Park
Office of International Programs
1122 Holzapfel Hall
College Park, MD 20742-5610
Tel: 301.405.0456 (office)
Tel.: 310-229-0739 (home)
E-mail: jm.rtgroene@verizon.net

Appendix J

Fulbright Occasional Lecturer Program Travel Award Application Form

Name: _____ Home Country: _____

I.D. # From insurance card: 301 _____ Social Security: _____ - _____ - _____

(A SSN or ITIN is required to receive an OLP award)

Expected date of departure at end of your grant: ____/____/____ (MM/DD/YYYY)

ALL OLP TRAVEL AWARD APPLICATIONS MUST BE APPROVED IN ADVANCE BY CIES

Dates of trip: Start _____ End _____

(1) Lecture Title: _____

Institution: _____

Address of Lecturing Site: _____

City: _____ State: _____ Zip _____

Date of Lecture: ____/____/____ (MM/DD/YYYY)

Type of Audience (Circle all that apply): Faculty Professionals Students General Public

(2) Lecture Title: _____

Institution: _____

Address of Lecturing Site: _____

City: _____ State: _____ Zip _____

Date of Lecture: ____/____/____ (MM/DD/YYYY)

Type of Audience (Circle all that apply): Faculty Professionals Students General Public

(3) Lecture Title: _____

Institution: _____

Address of Lecturing Site: _____

City: _____ State: _____ Zip _____

Date of Lecture: ____/____/____ (MM/DD/YYYY)

Type of Audience (Circle all that apply): Faculty Professionals Students General Public

Preferred mailing address: _____

(checks cannot be mailed outside of U.S.): _____

City: _____ State: _____ Zip: _____

Daytime phone: _____ Home phone: _____

E-mail address: _____ Fax: _____

Is an honorarium offered? Yes _____ No _____ Amount: \$ _____

(If yes, please include a letter that states the amount of the honorarium from the institution that will pay it)

You must attach a copy of lecturing invitation or confirmation of a conference presentation

Occasional Lecturer Program Instructions

In order to qualify for an award under the Occasional Lecturer Program, you must apply in advance of your trip. Please follow the instructions below carefully:

1. Complete the OLP Application Form. OLP travel awards only cover travel within the United States and its territories (e.g. Puerto Rico, Guam.)
2. Attach one or more invitations to lecture at a university or college, or to present at a conference (note: OLP travel awards may only be used for conferences if they are hosted by institutions and benefit the institutional community).
3. Application must include current U.S. residential address, and address of OLP host institution.
4. CIES will calculate award amount as follows:
 - Distance will be calculated using your U.S. residential address as the starting point and the address of the conference or lecture site as the destination
 - Mileage will be determined one way, based on the most direct route, regardless of your chosen method of travel
 - If you give lectures in more than one location, distances will be calculated to each destination sequentially
 - \$250 award will be made for distances of 75-499 miles
 - \$500 award will be made for distances of 500-1999 miles
 - \$750 award will be made for distances of 2000 miles or more
 - No award for distance of less than 75 miles
5. Email, mail or fax this completed form and attachment(s) at least one month in advance of your trip to:

Occasional Lecturer Program/CIES

3007 Tilden Street, NW, Suite 5-L

Washington, DC 20008-3009

Tel: 202.686.6235; Fax: 202.362.3442

Email: olp@cies.iie.org

6. Upon approval, CIES will send you an OLP travel award letter and evaluation form. Return the completed evaluation form after your trip to apply for OLP travel award payment, which will be mailed 2-4 weeks after CIES receives the evaluation form. (If you will be leaving the United States soon after your trip, you will need to make other arrangements to receive your check, as CIES cannot mail checks outside the United States.)
7. **You must have a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) to receive an OLP award.** See the section on “Obtaining a Social Security Number or Individual Taxpayer Identification Number” in the *Guide for Visiting Fulbright Scholars* for more information. CIES must have your Social Security Number or Individual Taxpayer Identification Number on file before a check can be issued.

**Thank you for your participation in the
Fulbright Occasional Lecturer Program!**